



ESA MARKETPLACE ACCESS PROGRAMME

Fostering the development of industrial players
in new and emerging upstream and downstream
markets to achieve sustained commercial growth.

FOUR PATHS TO COMPANY SUCCESS

*Companies with
bold growth ambitions
& market-ready technologies (TRL 7+)
can unlock tailored support through
the ESA Marketplace in the following ways:*

1

ENHANCING VISIBILITY AND CREDIBILITY

- Showcase new products and services for scaling up businesses.
- Sharing technical industry insights across the ESA community to support potential future adoption in ESA missions.

2

BOOSTING CUSTOMER ACQUISITION

- Supporting the rollout of new services/products.
- Building strategic commercial partnerships.
- Access global market opportunities.

3

ACCELERATING TIME-TO-MARKET

- Speeding up the technical demonstration in an operational environment (TRL 9).
- Building strategic commercial partnerships.
- Shortening Time-to-Market.

4

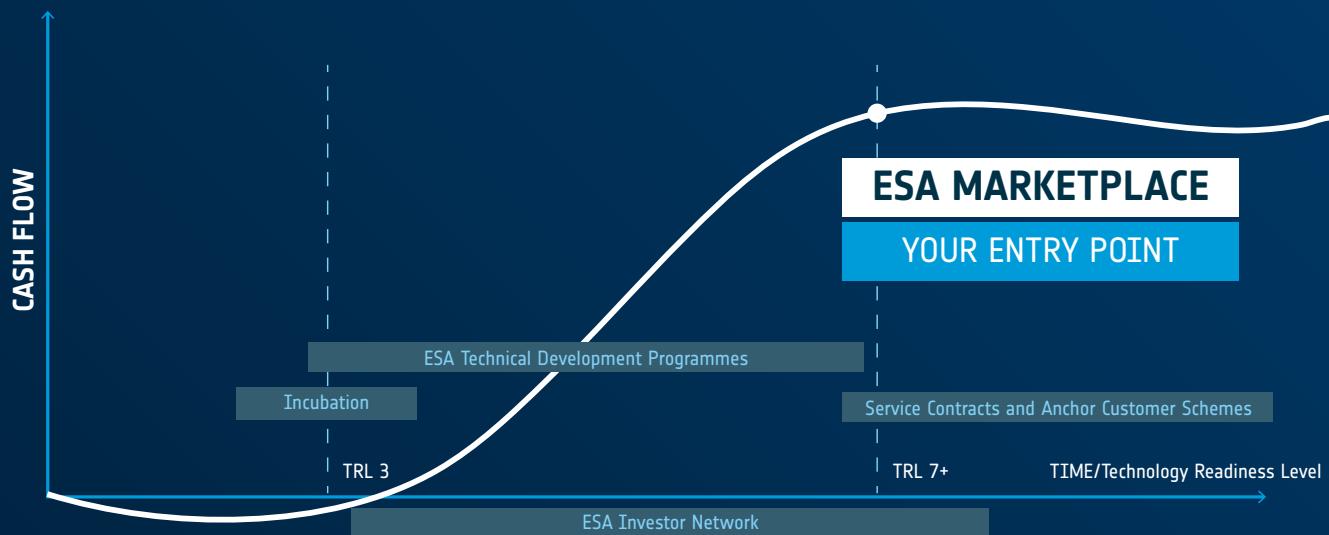
ATTRACTING PRIVATE INVESTMENT

- Unlocking equity and debt investment opportunities by providing stablescalable revenue streams to Marketplace companies.
- Leveraging ESA Investor Network partnerships to multiply growth funding to companies.

A UNIQUE APPROACH TO GROWTH

How the ESA Marketplace is designed to boost your business growth

ESA supports the Company's Commercialisation Trajectory



Key features of the ESA Marketplace across all verticals

**FAST-TRACKED
PROCUREMENT**

**STRAIGHTFORWARD
IMPLEMENTATION**

**DECREASING
CO-FUNDING %**



Satellite Manufacturing
and Operations



Launch and Return
Mission Services



In-orbit Assembly
& Manufacturing



Space Situational
Awareness



Ground
Terminals



SatCom



Cybersecurity



Pharma
and Agrifood



Environmental
Monitoring



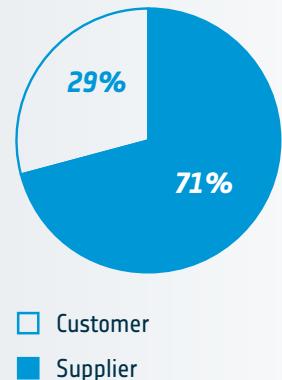
Infrastructure
Monitoring

THE ESA MARKETPLACE INSIGHTS

What has the agency learned?

Early sales remain one of the biggest barriers to growth

- 71% of applicants are suppliers seeking help with customer acquisition.
- Both companies and investors consistently highlight customer traction is a critical factor for growth and investment readiness.
- Europe is building a strong space supply chain, but anchor customers are essential to unlocking its full commercial potential.



The ESA Marketplace provides financial support to land first customers and build market credibility.



Raising capital is tough without market traction – prototypes alone don't convince investors

24 contracts
were awarded
through
the programme,
worth a total of

**€51
million**

€25 million
in **ESA co-funding**,
with customers
contributing
an **additional**

**€26
million**

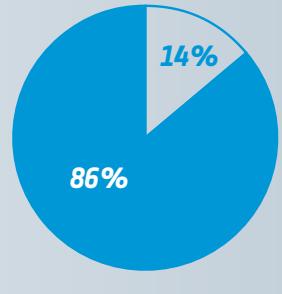
40%
of supported companies
fundraised after their
ESA Marketplace contract,
raising a total of

**€350
million**

The ESA Marketplace helps companies convert early sales into investor confidence – accelerating access to private capital.

Without access to global markets, companies risk falling behind in scale, revenue, and competitiveness

- Companies targeting global customers had higher growth and greater success in securing support.
- Over 20% of proposed partnerships focused on sales beyond Europe.
- Competing globally requires international commercial traction.

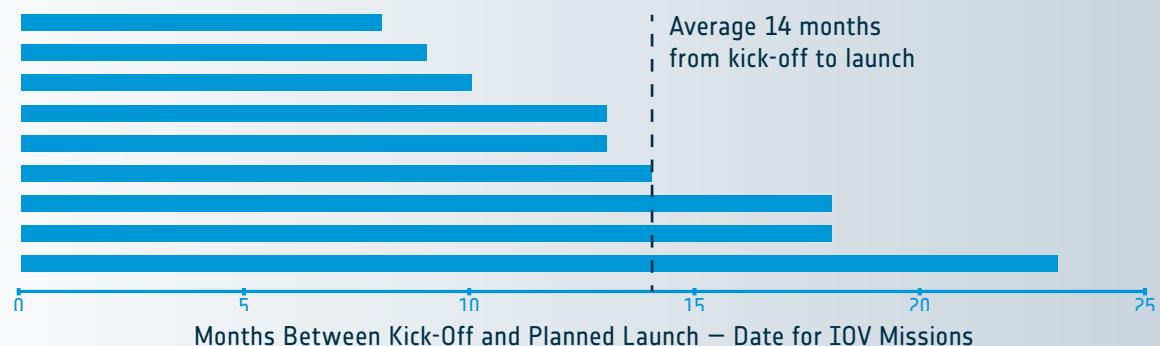


The ESA Marketplace helps companies enter international markets, supporting commercial expansion and enabling scalable, global growth.



Delays to launch mean lost revenue, missed customers, and broken commitments

- Marketplace contracts average 14 months from kick-off to launch.
- Companies value fast, compatible IOD partners to stay on track.
- Contracts issued in 6–12 weeks enable companies to meet tight timelines.



The ESA Marketplace offers the fastest route to space, enabling companies to reach the market sooner, generate revenue faster with the partner of their choice.

HOW COMPANIES ARE USING THE ESA MARKETPLACE

Real-World scenarios to unlock value

**ATTRACTING
NEW
CUSTOMERS**

Acting as a supplier, companies have used the ESA Marketplace to attract early adopters – turning pilot opportunities into commercial success.

**EXPANDING
GLOBAL AND
BEYOND SPACE**

Companies connect with clients across non-space sectors and international markets, delivering space-based services around the world.

**ACCESSING
SPACE
FASTER**

Acting as a customer, businesses have been supported to launch of their new products in space with an IOD provider of their choice.

Yuri
Aerospacelab
Open Cosmos
R-space
Space Cargo Unlimited

Constellr
Dcubed
Vyoma
MagDrive
Klepsydra

Aerospacelab
LivEO
SatVu

Companies* applying to the ESA Marketplace have developed their products and services in the frame of ESA programmes



*86% of companies are ESA BIC Alumni

POSSIBLE FUTURE CAMPAIGNS

Proposals for new thematic campaigns	Supporting ESA directorates	Link with other ESA programmes
Commercialisation of in-space manufacturing facilities and space microgravity laboratory /services	HRE, CIC, TEC	BSGN, GSTP, BASS
Boost export of European commercial space products and services , penetrating global markets	All directorates	ARTES, GSTP, InCubed, Space Safety, Boost, BSGN, ESA BIC Alumni
Commercialisation of space safety services , including Life Cycle Assessment, developed within the PROTECT	OPS	Space Safety, CleanSpace, ESA BIC Alumni
Commercialisation of space solutions for the green transition	EOP	InCubed, BASS, Space Safety, GSTP, ARTES, Boost!, ESA BIC Alumni
Foster the growth of in-space transportation market	STS, HRE	FLPP, GSTP, Boost!, LEO Cargo
Facilitate the commercial roll-out of the Serenity networks and associated Hubs	CSC	Artes, GSTP
Facilitate access to space expert resources and test facilities	TEC, STS	GSTP, ARTES, InCubed, Boost!, ESA BIC Alumni

AT A GLANCE



AN EVOLVING EUROPEAN MARKETPLACE

The current companies in the ESA Marketplace by June 2025

