

The ESA Perspective to New Space and entrepreneurship



ESA COMMERCIALISATION GATEWAY

SPACE FOR BUSINESS
BUSINESS FOR SPACE

Geospatial World Forum

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Rotterdam, The Netherlands

Dr. Gianluigi BALDESI

Commercialisation Department

NEW SPACE AGE, NEW SPACE APPROACH

[COMMERCIALISATION.ESA.INT](https://commercialisation.esa.int)

THE NEW SPACE ECONOMY

OPPORTUNITIES

LAUNCH PRICE
TO BE DIVIDED
BY 3 IN NEXT 10Y

HIGHER PAYLOAD CAPACITY
AND LAUNCH RATE

DEORBITING REGULATIONS

SPACE-AS-A-SERVICE

EDGE-COMPUTING/AI
FOR GROUND SEGMENTS
AND SPACE DATA

GREEN/ELECTRIC PROPULSION

IN ORBIT SERVICING,
MANUFACTURING, ASSEMBLY

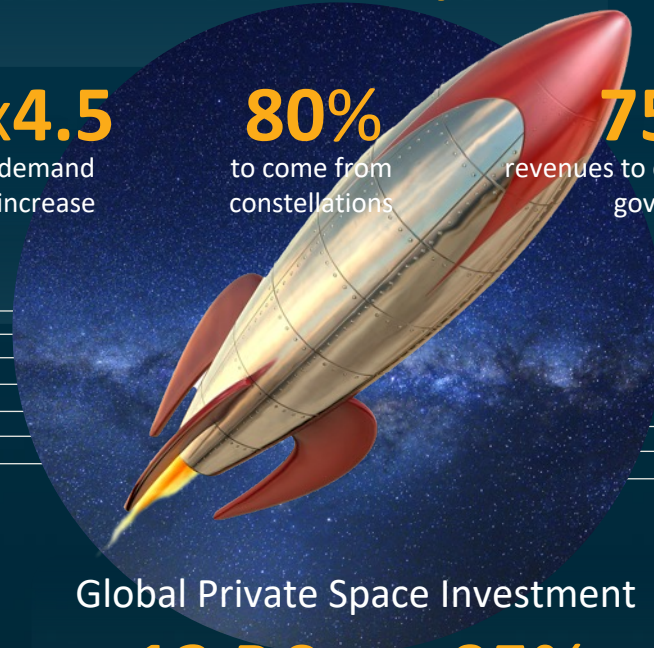
Avg. Satellites launched/year
2021–2031

382 → **1,704**

x4.5
demand
increase

80%
to come from
constellations

75%
revenues to come from
govt.



Global Private Space Investment

13 B€ in 2021 **+95%** since 2020

Global Public Space Investment

93 B€ → **113 B€**

CHALLENGES

REACHING OUT TO POTENTIAL
INVESTORS

ASSOCIATED BURDENS AND
DELAYS

LACK OF KNOWLEDGE OF
AVAILABLE OPTIONS

AGREEING ON TERMS AND
CONDITIONS

LACK OF BUSINESS EXPERTISE

DIFFICULTIES TO COMPLY WITH
REQUIREMENTS

ONE ROCKET LAUNCH ALMOST EVERY TWO DAYS



THE NEW EUROPEAN SPACE AGE

14 B€

(+3%) of European
INSTITUTIONAL space
investment in 2021
14% of the Global

1 B€

(+66%) Private
investment in European
space start-ups to grow
in 2022-ups

80 B€

of European downstream
revenues in 2022
24% of the Global

COMMERCIALISATION IN AGENDA 2025 AND THE 3 DRIVERS



For ESA, there are no “New Space companies”, but a New Space approach which can be observed from large well-established companies to small newcomer entities. This approach implies a business mindset based on private investments leveraging on speed, customer focus and new risk acceptance culture.



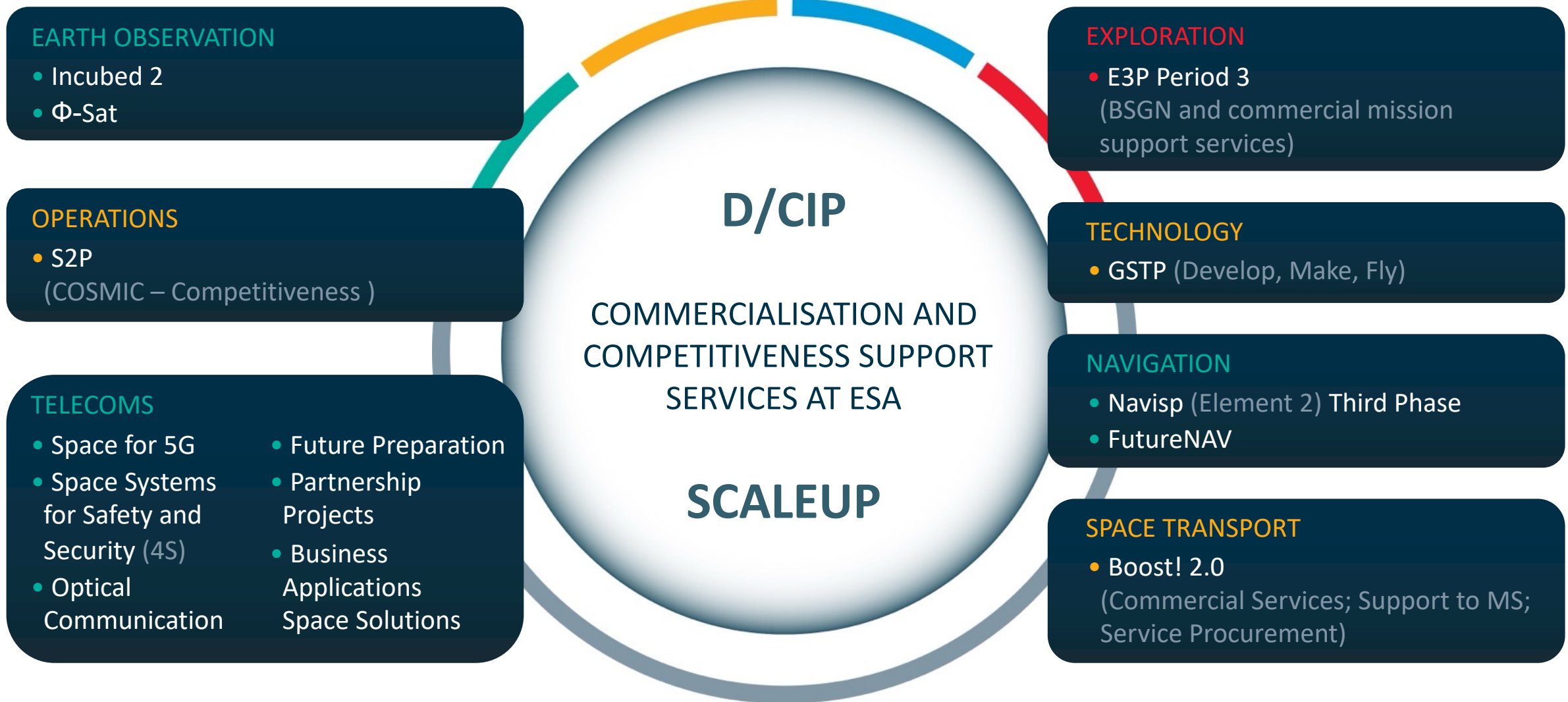
BEFORE
LAUNCHING
ROCKETS



WE
LAUNCH
IDEAS



COMMERCIALISATION@ESA



THE **ENTRY POINT**
TO ALL ESA
COMMERCIALISATION
SERVICES



MARKET INTELLIGENCE FOR ESA PROGRAMMES, INVESTORS AND ESA COMMERCIALISATION NETWORK

A '**ONE-STOP SHOP**' SERVICE FOR ALL COMMERCIAL OPPORTUNITIES

A WEBSITE, SOCIAL MEDIA CHANNELS AND NEWSLETTERS TO **GIVE VISIBILITY TO ESA'S COMMERCIAL INITIATIVES**

AN **EASY ACCESS** TO ESA COMMERCIALISATION SERVICES AND NETWORKS OF RESOURCES

AWARENESS AND SUPPORT FOR THE USE OF SPACE INFRASTRUCTURE AND DATA FOR APPLICATIONS AND SERVICES

3000+ SMEs
REGISTERED
WITH ESA

1380 SMEs
CONTRACTED*

*JUNE 2022

9.6%
COMMITMENTS
TO SMEs*

*PERIOD 2017–2021



THE ACTIVITIES OF THE SME OFFICE ADDRESS THE FOUR MAIN AREAS OF THE SME POLICY:

GENERAL SUPPORT MEASURES

Point of contact SME, Training Courses, Networking & Visibility (esa-match, ISD), Supporting Awareness of ESA Business Opportunities, Analyses and surveys

PROCUREMENT MEASURES

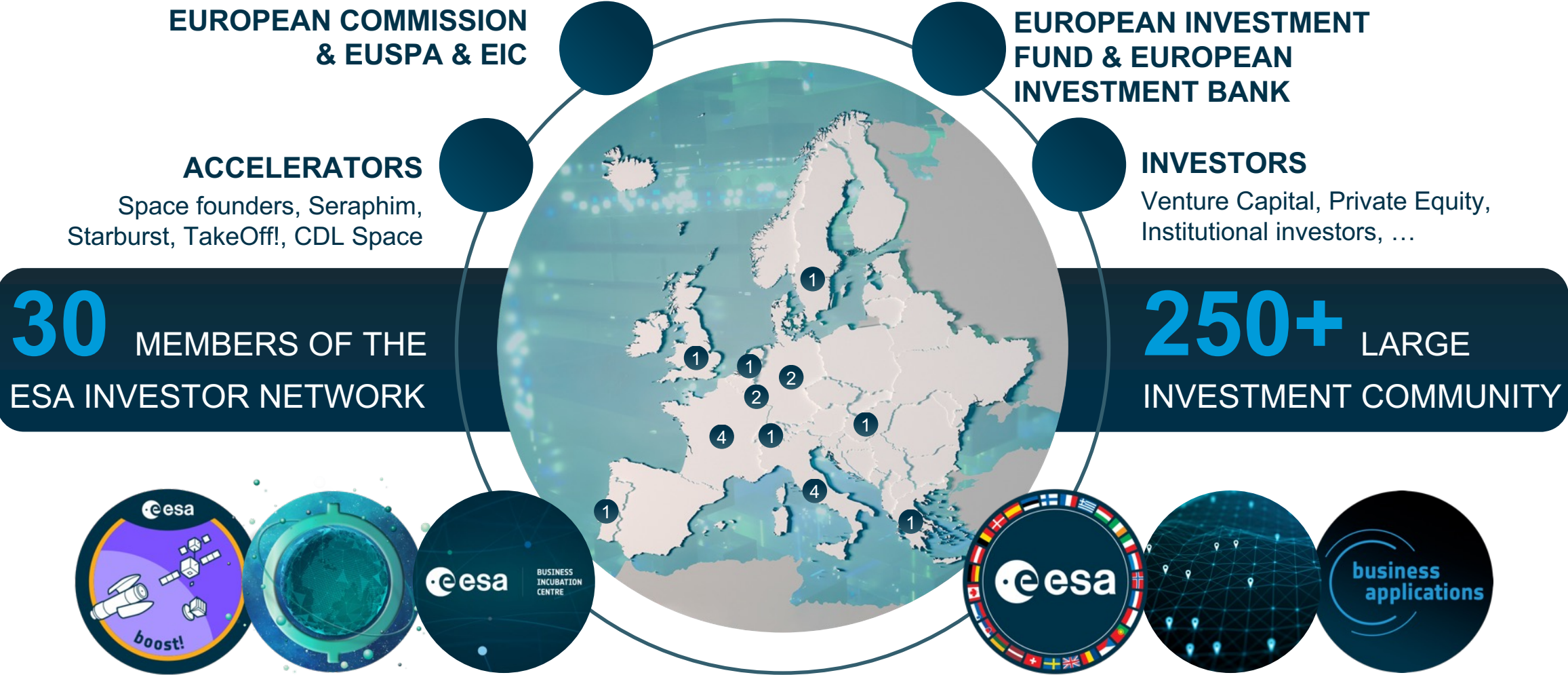
Reserved Share for SMEs in the Frame of Large Procurements, Model-subcontracts, COVID-19 measures, ...

INDUSTRIAL POLICY MEASURES

SME specific procurement clauses, Advance Payments, ...

FINANCIAL MEASURES

Financial viability of SME, Neutral Cash flow, Access to Finance





INVEST

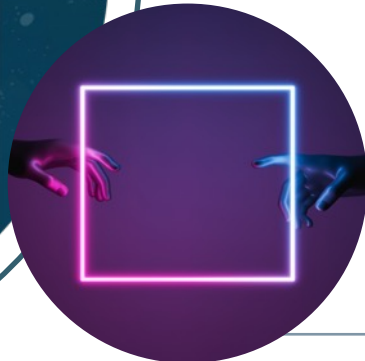
SUPPORTING THE SCALEUP OF VENTURES

BUSINESS SUPPORT

Pool of various services to best answer individual acceleration needs
For companies with high business potential with mature technology

ESA MARKETPLACE

Development of industrial players on new upstream & downstream markets aggregating service requests and offers from and for industry



INNOVATE

Disruptive research innovation projects

Φ-LABNET

Start-up creation & incubation services for entrepreneurs

ESA BICs NETWORK

Commercial innovation projects integrating space technologies

ESA BROKERS NETWORK

BOOSTING INNOVATION AND COMMERCIALISATION

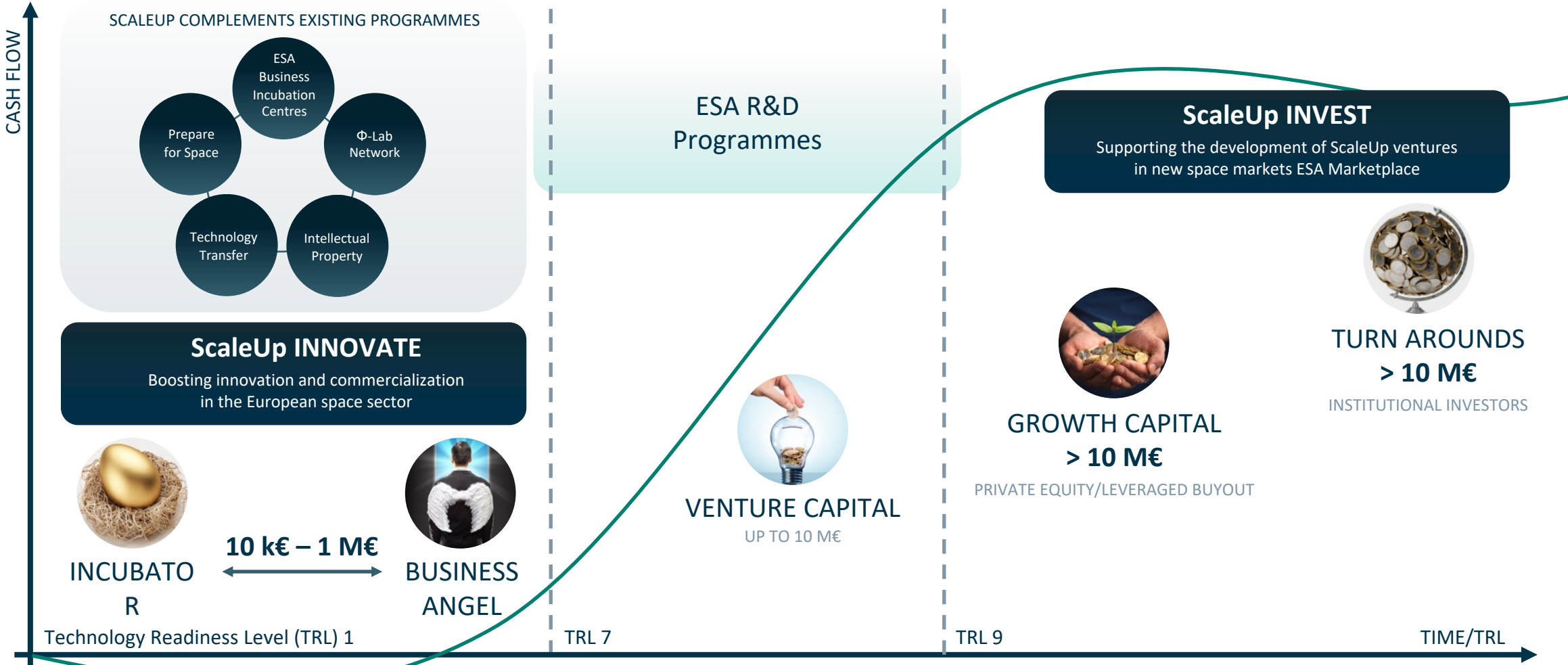
121 M€
TOTAL
SUBSCRIPTIONS

OVERSUBSCRIPTION
OF
+20%

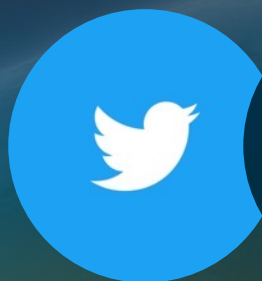
INNOVATE ELEMENT
FUNDED WITH
100 M€

INVEST ELEMENT
FUNDED WITH
21 M€

CONTRIBUTIONS IN THE COMPANY'S LIFE-CYCLE



TOGETHER WE INVEST AND INNOVATE YOU SCALE UP!



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