

ESA

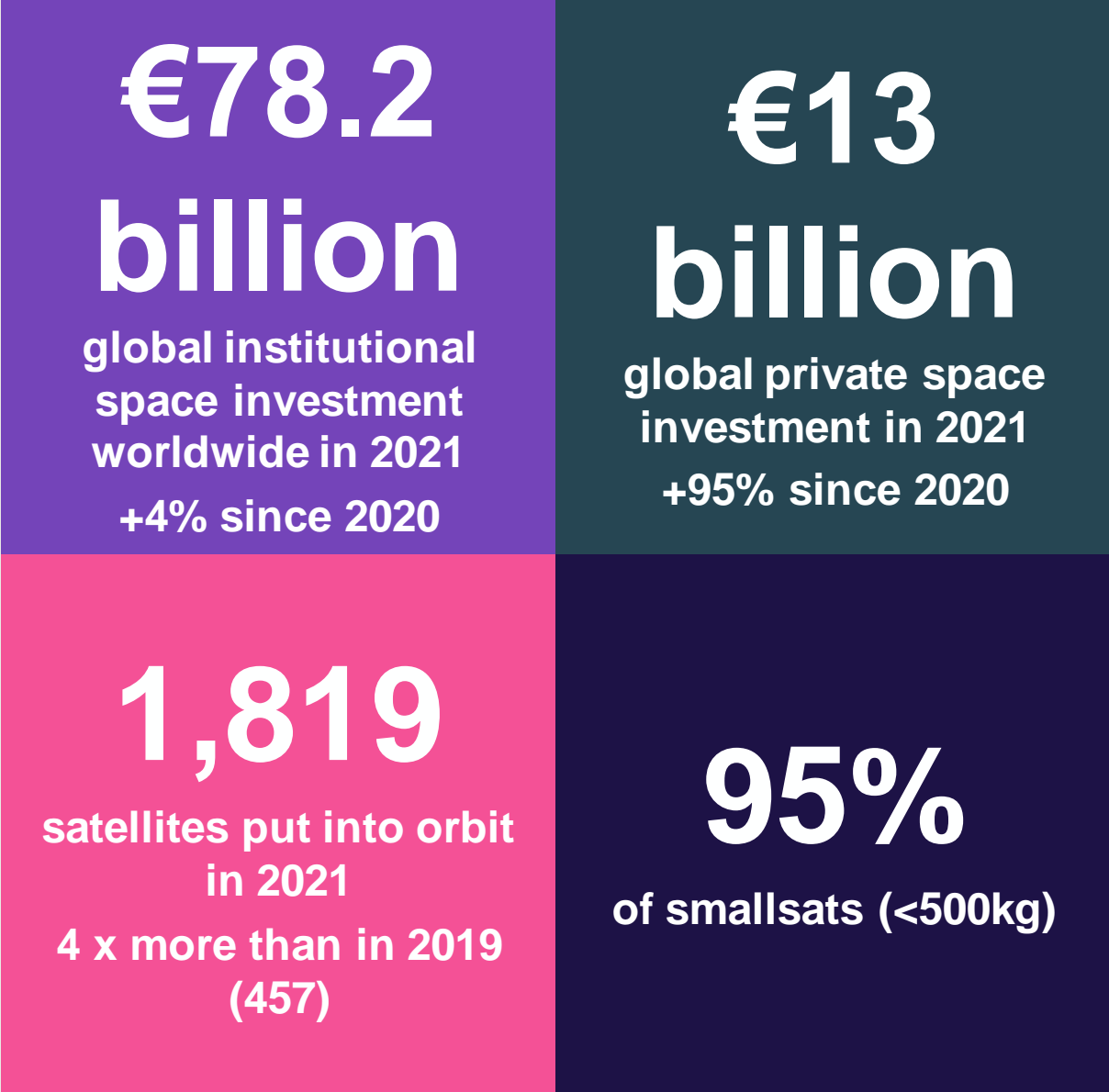
COMMERCIALISATION

Join the business journey

Space Innovation Forum
Kiruna, 13/10/2022

Luca del Monte
Head of Commercialisation Dept

THIS IS A NEW SPACE AGE



Source | Euroconsult, 2022



ONE ROCKET LAUNCH ALMOST EVERY TWO DAYS

145 launches in 2021
+27% from 2020



Sources / Euroconsult 2022, ESPI 2021



THE NEW SPACE ECONOMY



BUT THIS ISN'T

ONLY HAPPENING
ACROSS THE
OCEAN



THE NEW EUROPEAN SPACE AGE

€11.9 billion

(+7%) of European institutional space investment in 2021



€7.5 billion

of European upstream revenues in 2021

+14%

Private investment in European space start-ups continues to grow in 2021

Source | Euroconsult, 2022



TODAY WE START BUILDING THE FOUNDATIONS OF THE EUROPEAN BUSINESS JOURNEY



**SPEED UP
TIME
TO MARKET**

**CUSTOMER-
ORIENTED: GOOD
ENOUGH VS BEST
IN CLASS**

**NEW APPROACH TO
PROJECT MANAGEMENT
AND RISK
ACCEPTANCE**

ESA AND NEW SPACE

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.

SPEED

CAPITAL

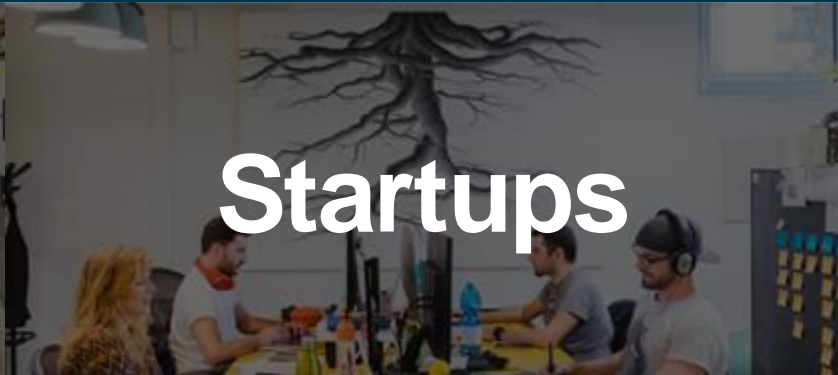
TALENT

OUR AMBITION
**TO MAKE EUROPE A SPACE
COMMERCIALISATION HUB**
**TO LAUNCH AND GROW GLOBAL SPACE
COMPANIES THAT MAKE SENSE FOR
OUR FUTURE**

BEFORE LAUNCHING ROCKETS, WE LAUNCH IDEAS



THE ARENAS WE WILL PLAY IN



COMMERCIALISATION GATEWAY



Easy access for newcomers
One stop shop
Raising awareness on space opportunities

SME OFFICE

INDUSTRY SPACE DAYS 2022



SME Information and support
Helpdesk dedicated to SMEs
Training, Networking and Matchmaking

TECHNOLOGY TRANSFER



Supporting the integration of space in your business and your business in space

Technology scouting

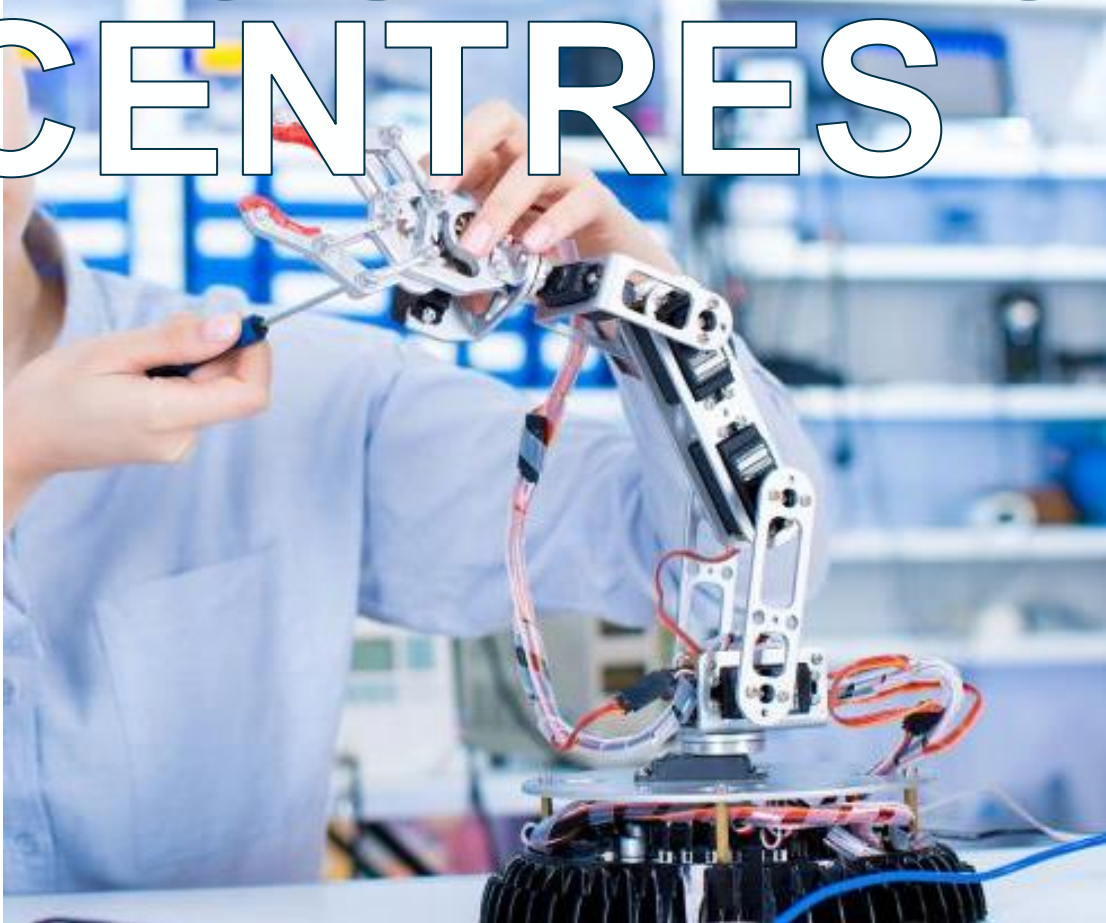
Brokering introductions to potential clients

Business support to develop successful business cases

Technical feasibility and market analysis

Funding for innovative projects

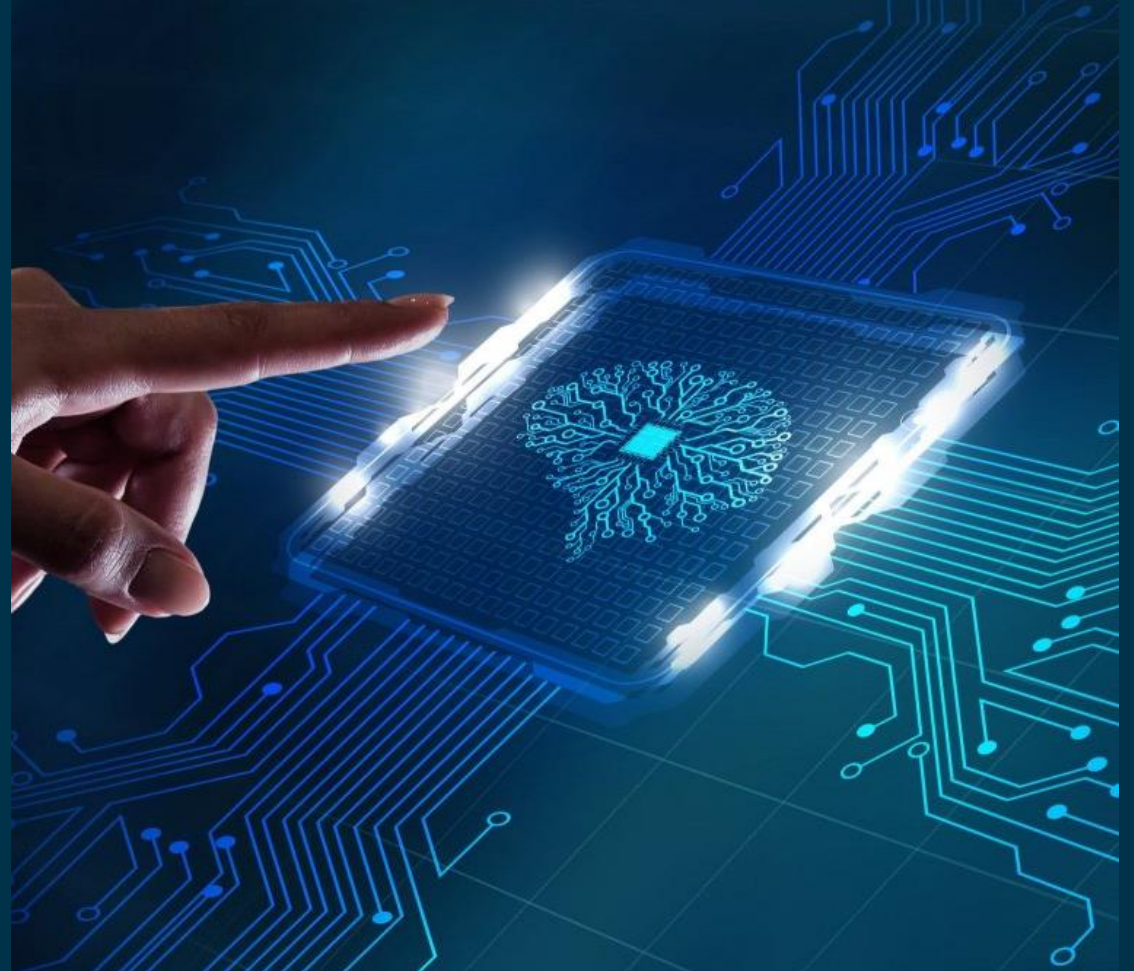
BUSINESS INCUBATION CENTRES



The largest network of space incubators in Europe
Accelerating commercial growth
Supporting entrepreneurs during the maturation
Pushing scale-up and growing the community of successful space related start-ups



Φ-LAB NET



Accelerate the future of Space via transformative innovation
Generating commercial competitive advantage
Facilitating investment actions

SCALE UP



- Supports **New Space** developments, allowing companies to take more risks, hit the markets faster, attract investors, and introduce game-changing innovation.
- Is **domain independent, including upstream and downstream.**
- Does not address TRL maturation, but provides **end-to-end business support to innovation.**
- Fosters **innovative agreements** and approaches with industry.
- Offers to **all ESA Directorates** a platform to create new industrial players, explore new markets, and/or scale up promising companies emerging from their respective programmes.
- Provides **Participating States the flexibility** to move their contributions across the different elements of the programme, to quickly react to new market evolutions and opportunities.

SCALE UP



CONNECTION WITH THE INVESTORS COMMUNITY

Element 1: INNOVATE

Boost innovation and commercialisation in the European space sector

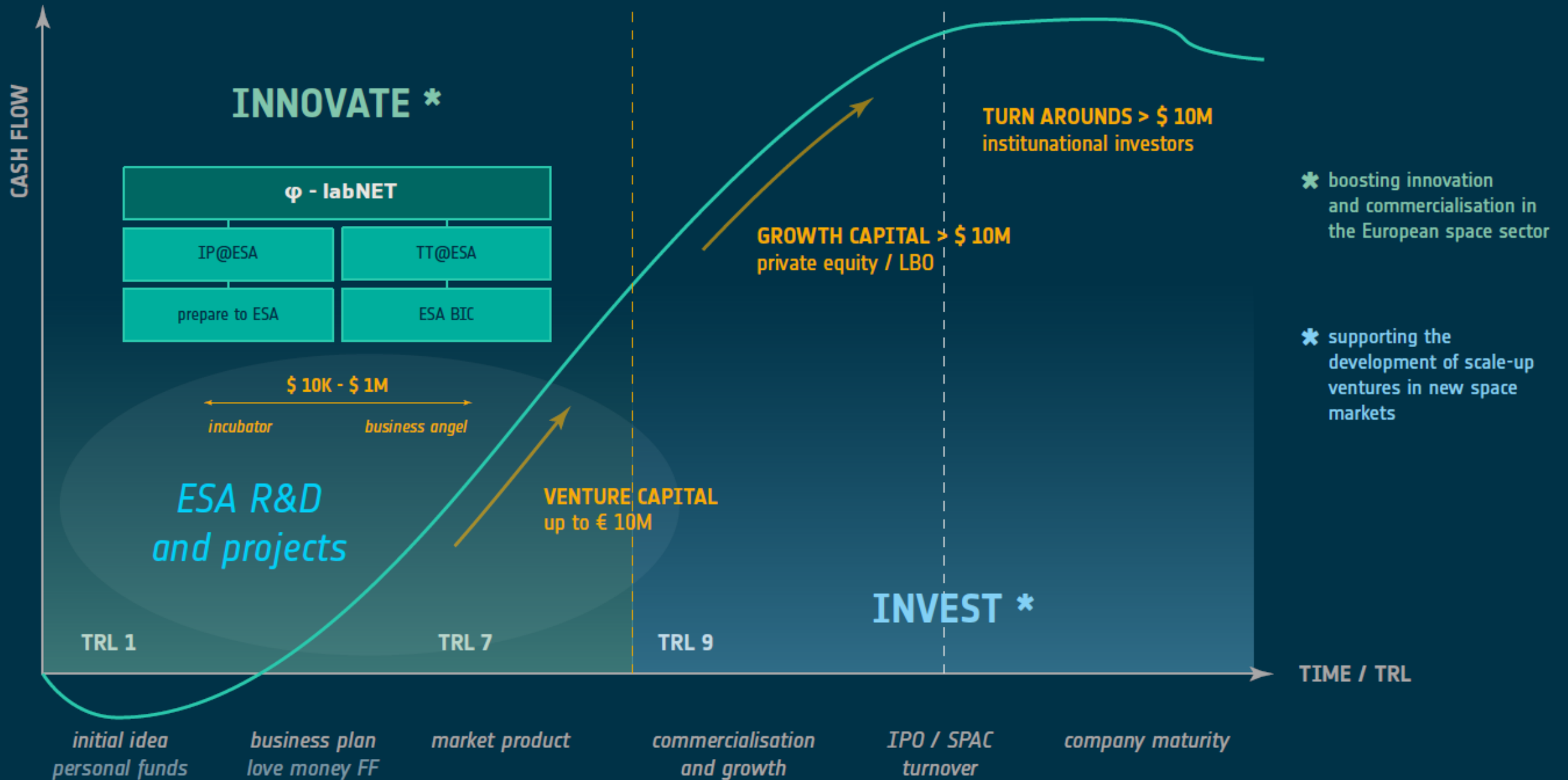
- Foster transformative market-ready innovation by the 'innovate and apply under-one-roof' approach (**Φ-labNET**)
- Protection and commercialisation of industry IP (**IP For Commercialisation**)
- Transfer of technology for commercial purposes (**TT 2.0**)
- ESA Business incubation centres network 2.0 (**BICs**)
- Reduce barrier to enter ESA Programmes (**Prepare For Space**)

Element 2: INVEST

Support the development of **scale-up ventures** in new space markets

- **Business VALIDATION**: a network of business accelerators to support business plans, strategies and growth
- **Business GROWTH**: a marketplace for new space services and products e.g. IOD/IOV opportunities

CONTRIBUTIONS IN THE COMPANY'S LIFE-CYCLE



Investors

Venture Capital, Private Equity, Institutional investors,...

- General Partner participation to ESA selection boards
- ESA Advisory/Scientific support
- Harmonised criteria definition for “Space Due-Diligence”
- Joint strategy for matchmaking
- Financial advisory to partner

European Investment Fund

- Alignment on Due Diligence
- Market analysis (w/ EIF)
- Capacity Building



→ Memorandum of Understanding with the EIF and ESA
Jan 25th 2022



European Commission & EUSPA



→ Joint statement with the EC, EUSPA, EIF and ESA
Jan 25th 2022

- Support to Cassini
- Coordination on events (matchmaking...)
- Space Index

Accelerators

Space founders, Seraphim, Starburst

- Advice support to accelerator batch companies
- Link with investors
- Promotion of events

Developing tools and mechanisms to support the whole ecosystem



Early Stage



Academia

- Projects with Business Schools
- Projects with MBAs

Growth



ESA Rising Stars50

- Gathering, selection and promotion of Europe's 50 Rising Stars companies

Under development



Space Tech Index

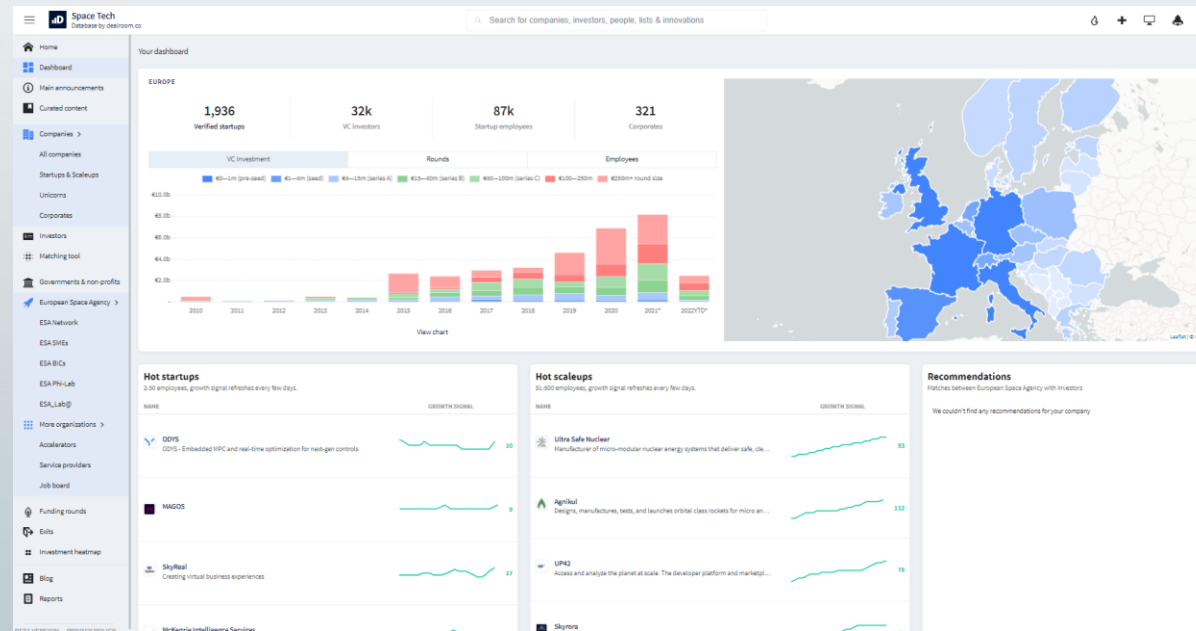
- Specific Indices for Publicly listed space tech companies
- Promotion to Stock Exchange for the creation of ETF

Under development with DEFIS and Promus Ventures

SpaceTech platform

spacetechn.dealroom.co

- A global intelligence financial data platform
- Using a corporate and inclusive approach
- Promoting the entire European Space Ecosystem
- Accessible for free
- Launched on June 15th



ESA UNCLASSIFIED – For ESA Official Use Only



→ THE EUROPEAN SPACE AGENCY

TOGETHER WE INVEST AND INNOVATE

commercialisation.esa.int



<https://twitter.com/esadownstreamg1>



linkedin.com/company/esa-commercialisation-gateway/



<https://www.facebook.com/esacommercialisationgateway>

YOU SCALE UP!