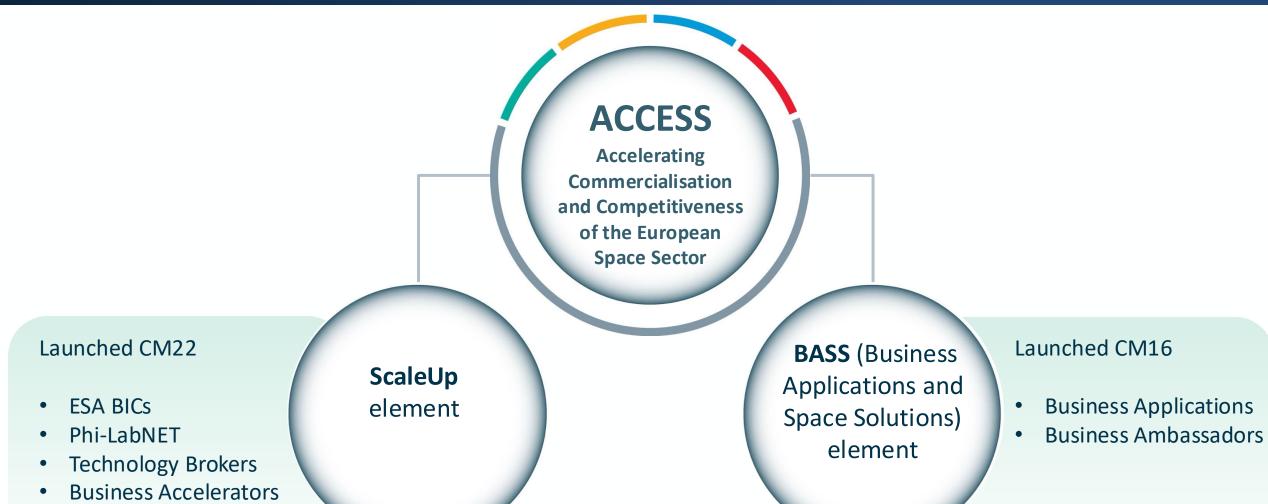


ACCESS Programme overview

INVEST





ACCESS Programme



Who we support

Addressing all types of innovative commercial space-related products, services and companies

All stages of company or product growth, from startups to SMEs, to established companies

What we provide

Technical and commercial support

Zero-equity funding to derisk design and developments activities

ESA Networks in space and non-space sectors

Ensuring European competitiveness in space and non-space markets

Our goal

In coordination with other ESA programmes

Socio-economic impact at scale



Accelerating Commercialisation and Competitiveness of the European Space Sector





ACCESS ScaleUp Element

ACCESS ScaleUp Element



Component 1



10

Phi-Labs

Thematic Approach

Bridging the Gap between Groundbreaking R&D and Commercialisation

Component 2



BUSINESS INCUBATORS

32

Centres

100+

Locations

230+

New Start-Ups p.a.

1800+

Start-Ups supported

Component 3



TECHNOLOGY BROKERS

13

Technology Broker

450+

Technology Transfers

Component 4



ACCELERATOR

1st Accelerator Launched in Germany

Providing the know-how of going from a start-up to a scale-up

(TRL 7-9)

Component 5



INVEST

Building your Commercial Pipeline

Remain Competitive on the global market

(TRL 7-9)

Phi-LabNET in a nutshell



Key Objective:

Bridge the gap between the research and commercial world and channel research efforts into developing commercially viable applications, products and solutions.

This is achieved via a new approach:

- > The programme focuses on maturing technology in response to demands from the commercial sector.
- Each Phi-Lab adopts a thematic focus, positioning itself as a reference center for its specific theme.
- Each Phi-Lab fosters a sustainable ecosystem for innovation, providing comprehensive support to economic operators and a range of services under one roof.
- As a network spanning ESA Member States, Phi-Labs facilitate the exchange of ideas, resources, and knowledge to develop sustainable commercial concepts through rapid iterative research.
- > Calls for applications can further refine this focus to address specific national and European priorities and needs.
- The governance structure of Phi-LabNET ensures a strong connection with ESA and national programmes.

Phi-LabNET current status



Austria

Industrial innovation for the upstream domain

Switzerland

Deep tech innovation (quantum, data, materials)

Poland

Robotic and AI for autonomy

Ireland

Advanced Manufacturing



Norway

Arctic requirements and needs

Spain

Space technologies and their application to boost climate resilience

Netherlands

EO, critical PNT infrastructure, secure satellite communication

Finland

Sensors & Geospatial Innovation

UK

Space enabled sustainability technologies

Sweden

Al and edge computing

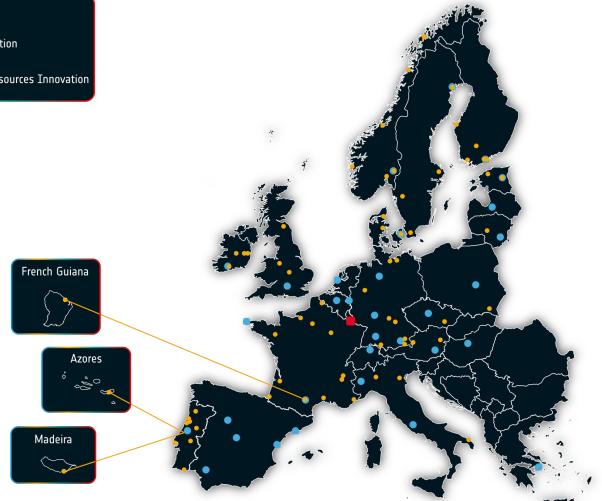
*On-going discussion and/or Procurement

ESA Business Incubation Centres





- Prime ESA BIC location
- ESA BIC
- European Space Resources Innovation



- ✓ The largest network of Space Incubators in Europe
- Accelerating commercial growth
- Supporting entrepreneurs during maturation
- Growing the community of successful space-related start-ups

32 ESA BUSINESS INCUBATION CENTRES

230+ START-UPS SUPPORTED ANNUALLY

1,800+ START-UPS SUPPORTED OVERALL

ESA Business Incubation Centres







OFFICE SPACES AND SHARED FACILITIES

> **NETWORKING** FOR START-UPS

TECHNICAL SUPPORT

BUSINESS DEVELOPMENT SUPPORT

60-80 K€ NON-EQUITY **FUNDING**



DOOR OPENER TO **INTERNATIONAL INVESTORS**

ACCESS TO ESA STARTUPS AND PARTNERS



Implemented by:





Supported by:



New ESA BIC Belgium launched in Brussels in April 2025



Over 48 Alumni since 2012
+ 5 new Incubatees selected in July 2025





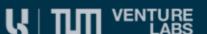
Business Accelerator Germany PREPARATION AND SUPPORT FOR FUND RAISING

SCALING UP RESOURCES AND BUSINESS STRATEGY

ACCESS TO NETWORK OF NON-SPACE INDUSTRY CLIENTS

Managed by:







18 COMPANIES ACCELERATED IN

THE NEXT 3 YEARS

1st Batch Kick-off

2025



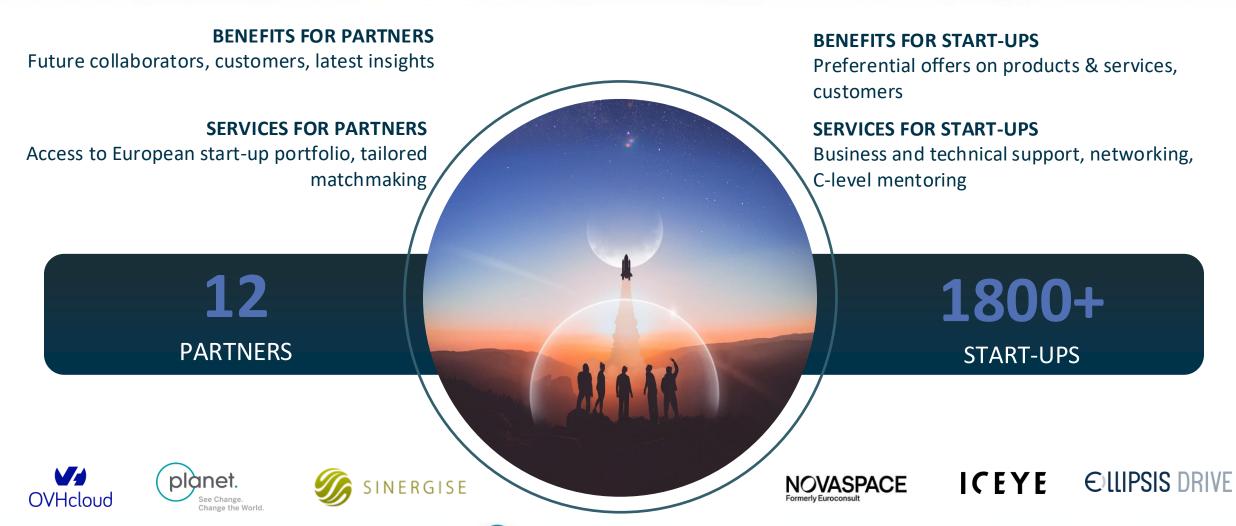






ESA Partnership Initiative for Commercialisation (EPIC)

















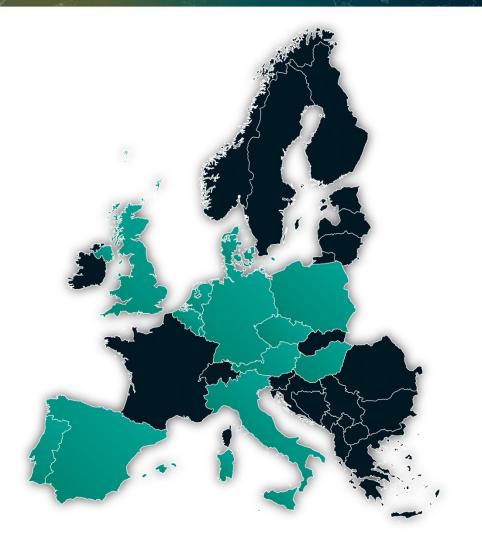
ESA Technology Brokers



ESA TECHNOLOGY BROKER

NETWORK

Participating States	
Austria	Luxembourg
Belgium	The Netherlands
Czech Republic	Poland
Denmark	Portugal
Germany	Spain
Hungary	United Kingdom
Italy	



35 TECHNOLOGY TECHNOLOGY TRANSFER BRIDGING THE GAP BETWEEN SPACE AND TERRESTRIAL MARKETS

- Creating Space Technology Spin-Offs
- Fostering Spin-In of Terrestrial Technologies
- Technology Scouting
- Solving Commercial R&D Challenges
- Providing Business Support to Develop Projects
- Technical Feasibility and Market Analysis
- ESA Spark Funding for Innovative Projects



Implemented by:



Supported by:



ESA Technology Broker active since 2014 in Belgium





























And many more...

Over 40 technology transfer studies and projects in the past 10 years



ESA Marketplace ScaleUp INVEST

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

1 Enhancing visibility and credibility

2 Boosting customer acquisition

3 Accelerating time-to-market

4 Attracting private investment

Demonstrated technology/proven services (TRL 7+)

Credible ambitious growth

Fast-tracked procurement



SUPPLIER

UPSTREAM AND DOWNSTREAM



CUSTOMER

SPACE AND NON-SPACE

DEAL

NATIONAL AND INTERNATIONAL

ESA MARKETPLACE COMPANY RECEIVES ENABLING CO-FINANCING FOR COMMERCIAL DEAL AGENCY GAINS INDUSTRY BUSINESS & TECHNICAL INSIGHT



Market Growth





Europe's New Space Leaders are supported to:

- Acquire new customers from around the world
- Accelerate time to market for commercial cutting edge products and services
- Enhance visibility on global market

19 Contracts €16M ESA co-funding



€33M Enabled Deal flow for European Industry

€170+M Capital raised (so far)

The ESA Marketplace Companies across 7 Participating States: AT, BE, CH, DE, FI, GB, LU

ESA Investor Network – Access to the financial community





ESA UNCLASSIFIED – For ESA Official Use Only

Please contact investor-network@esa,int

Network for exploring new

strategic initiatives

ScaleUp Ambition for Belgian Space Industry



Continue to support Belgian industry to convert industrial strengths into commercial revenue-generating solutions.

1. Maintain a Dedicated ESA Technology Broker

• Maximise uptake of space-developed technologies, know-how, and intellectual property in Belgium.

2. Consolidate ESA BIC Belgium

 Strengthen ESA BIC Belgium as a permanent anchor with a Brussels hub and regional nodes in Flanders and Wallonia

3. New Phi-Lab in Belgium

 Ensure Belgian space leadership for: SSA, resilience & secure comms, industrial manufacturing, dual use capabilities

4. Continue success of ESA ScaleUp Marketplace

 Give Belgian space companies critical support to acquire a strong commercial pipeline in a highly competitive environment



Introduction to ACCESS BASS element

ESA UNCLASSIFIED - For Official Use

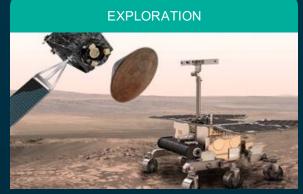
→ THE EUROPEAN SPACE AGENCY

ESA Space Solutions





















TO WORK TOGETHER TO MAKE YOUR IDEA COMMERCIALLY VIABLE, WITH:



Zero-Equity Funding (€50K-€2M+)



Tailored coaching



Access to our Network and Partners



Use of ESA Brand for credibility

AND ACHIEVE VALUE ENABLED BY SPACE







Business Applications: space-enabled services



Using any space asset(s) and integrating them with terrestrial assets for the benefit of life on Earth

Space Assets...



Earth Observation



Satellite Navigation



Satellite Communication



Spaceflight Technologies



...potentially coupled with...

Big Data analytics

VR/AR

AI/ML

Mega-constellations

Drones

Digital Twins

IoT

Cybersecurity

Blockchain

5G (https://artes.esa.int/esa-5g6g-hub)

...to serve Users & Markets



Maritime



Agriculture



Environment



Healthcare



Finance



Transport



Education



Media



Energy



Aviation

BASS Programme Components



1. Business Applications

Provides funding, business and technical support by placing industrial contracts and cooperative agreements with companies for conducting Feasibility Studies and Demonstration Projects

Demonstration Projects Implemented

- Pilot projects
- Growth projects

Feasibility Studies

- Implemented
- Kick-Start studies
- Proof of concept studies
- Enabling studies

+1000 business



Inspire, aid and foster new business and venturing opportunities in space-related business applications and services, as well as products based on space capabilities for terrestrial use. Provide high-quality business consultancy to companies

What ESA BASS offers



Zero equity funding

Always open for businesses from start up to academia to SMEs and large companies to address needs of any market, worldwide

Focus on ideation, development and demonstration of commercial services / products exploiting space technologies (e.g. SatNav, SatCom, SatEO):

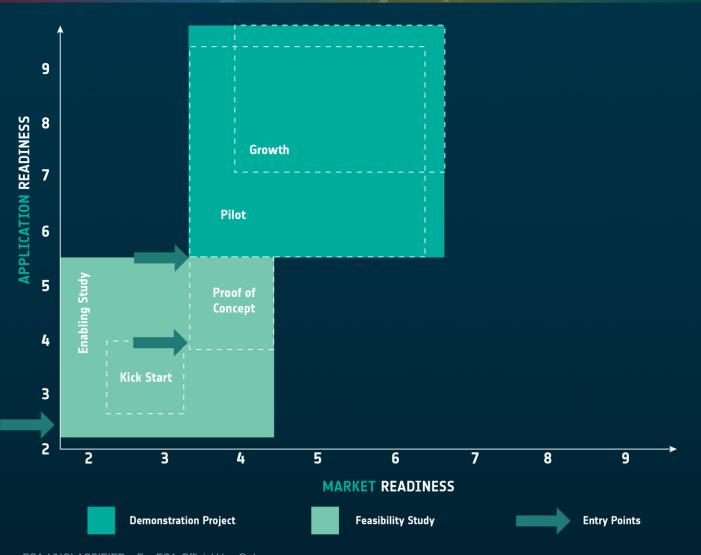
- User driven, innovative and sustainable services that help companies to be on the market.
- Activities proposed by companies responding to thematic call for proposals or permanently open call for proposals





Business Applications instruments: tailored to companies' needs





Feasibility Studies

- Explore the viability of new service concepts, consolidate the user landscape and requirements
- Evaluate the economic sustainability and technical feasibility of space-based solutions to user needs

Demonstration Projects

- Validate a technical solution and its business model
- Ensure user engagement
- Provide a transition towards operational activity

Business Ambassadors



Business Ambassadors are present in 8 countries: United Kingdom, Germany, Belgium, Czech Republic, Poland, Norway, Portugal, and Austria.

- They can advise companies on opportunities to apply to ESA programmes and BASS specifically:
 - Support preparation of the Activity Pitch Questionnaire
 - Provide companies with an overview of ESA Business Applications Calls
 - Consult on country-specific application process (if there is one)
- Business Ambassadors contacts can be found on <u>Ambassador Platforms | ESA Space Solutions</u>



Space for non-space: Task Forces



ENERGY

SMART & GREEN CITIES

MARITIME

BIOECONOMY

Launched in September 2022



Launched in January 2024

Launched in October 2024











































m sc









































WORLD URBAN PARKS















And many more...



Featured Opportunities

hydogen-powered The second

Maritime
Decarbonisation
- Green Fuels



Space for sustainable connected and liveable cities



Space for Urban and Peri-urban Agriculture



Space for Intermodal Transport



Space for Insurance Technology



Space
Supporting
Environmental
Claims



Space for Sustainability in Sports and Mass Events



Green Hydrogen as a Sustainable Energy Source



Calls

Permanently Open

Feasibility
Studies and
Demonstration
Projects



Commercial
Applications
Enabled by Space
Environments



Kick-Starts



