

Scale-Up



SPEED

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

CAPITAL

TALENT



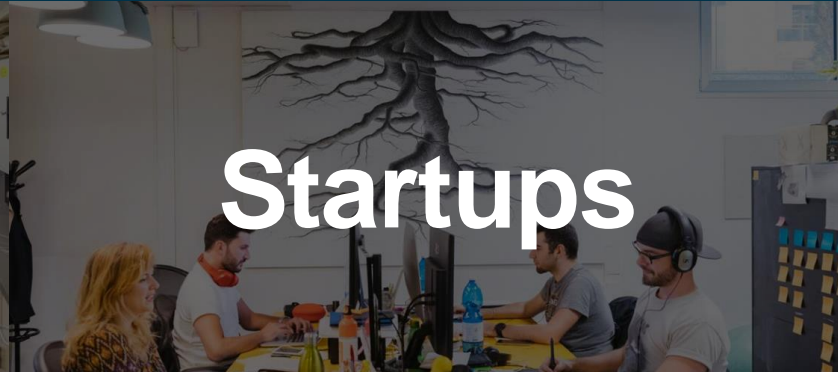
BEFORE LAUNCHING ROCKETS, WE LAUNCH IDEAS



THE ARENAS WE WILL PLAY IN



Academia



Startups



Space
companies



Non space
companies



Institutions

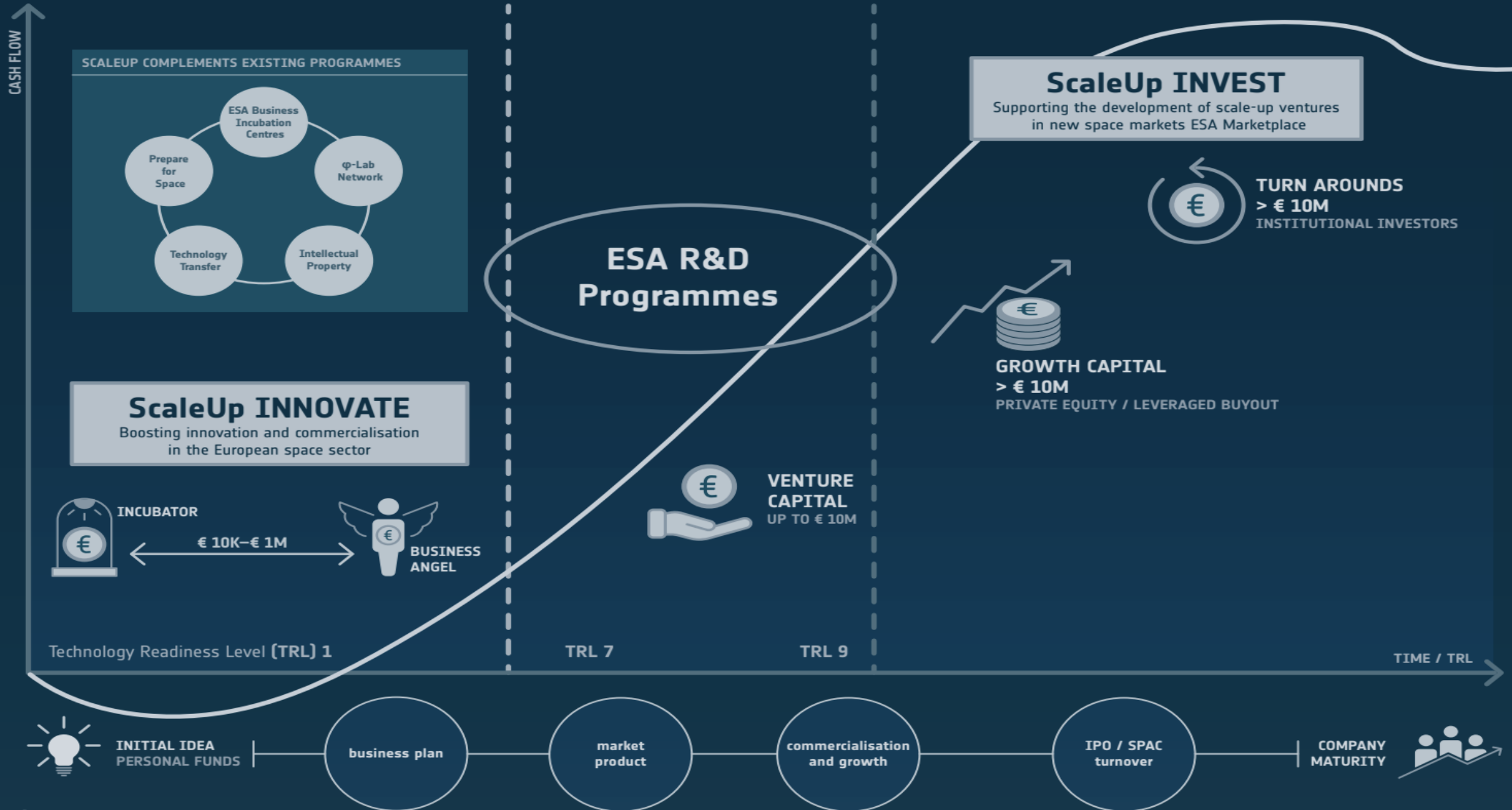


Investors

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 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

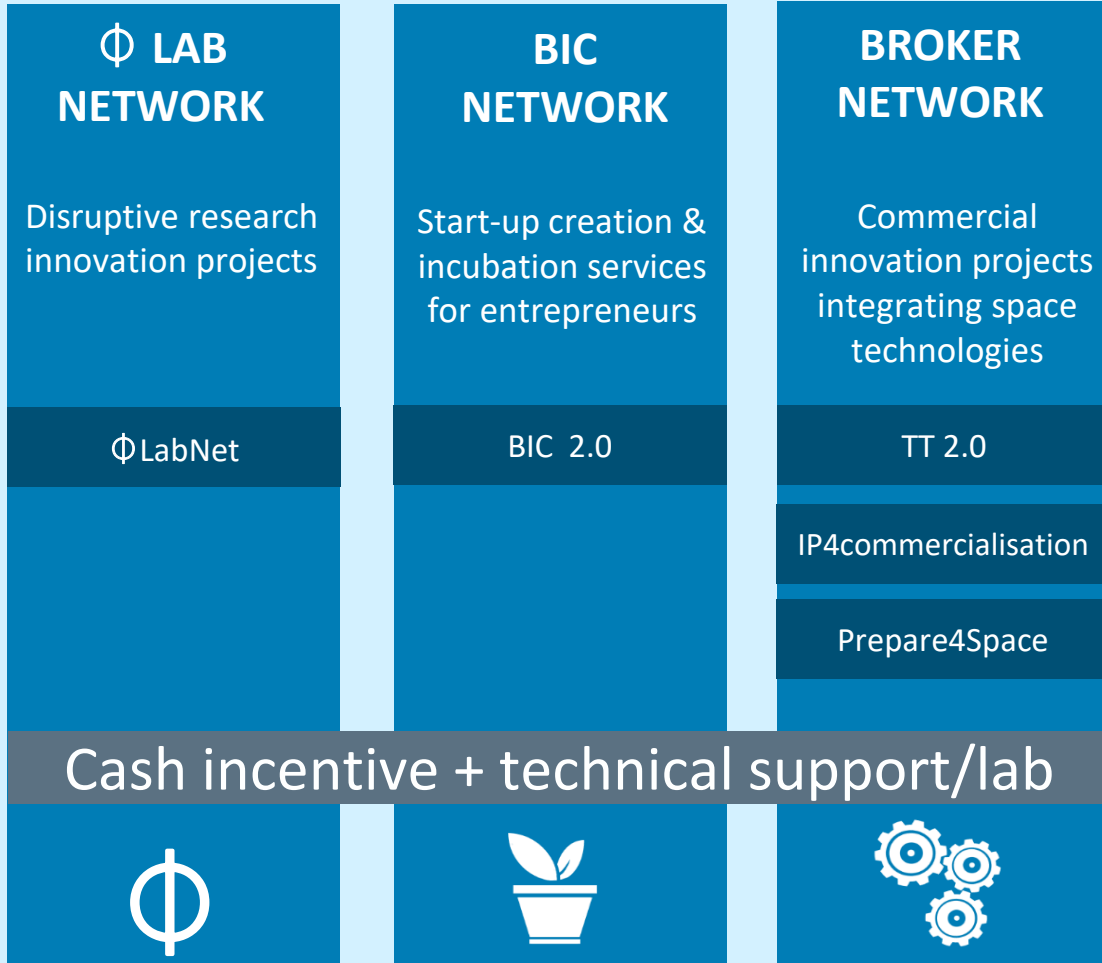
Support the development of **scale-up ventures** in new space markets

- **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



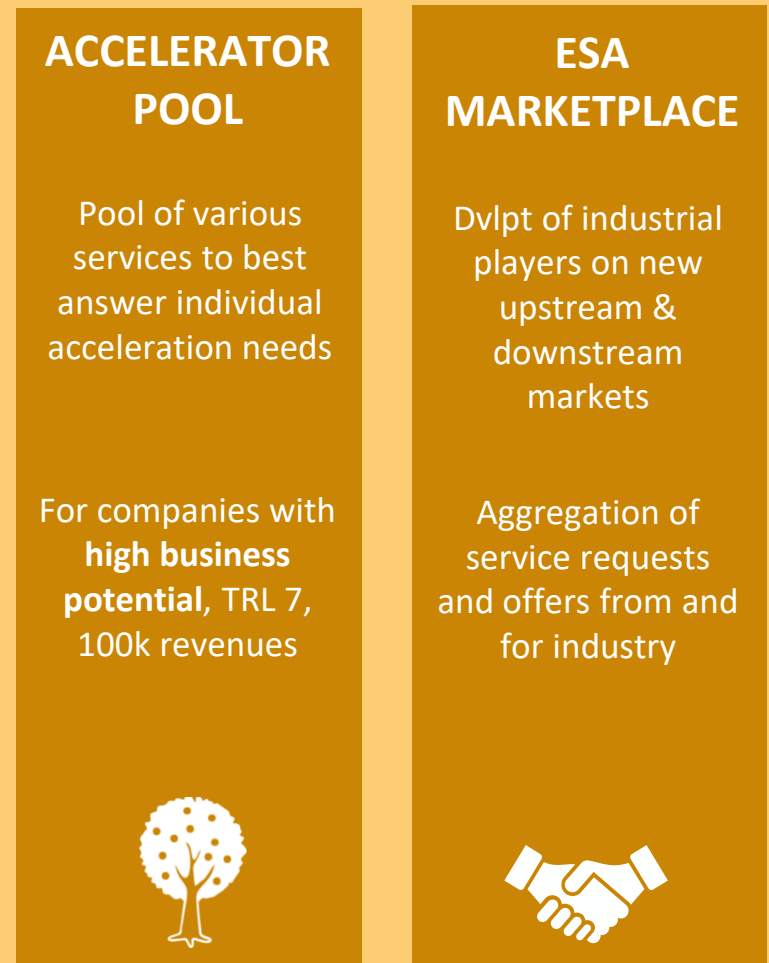
Boosting innovation and commercialisation

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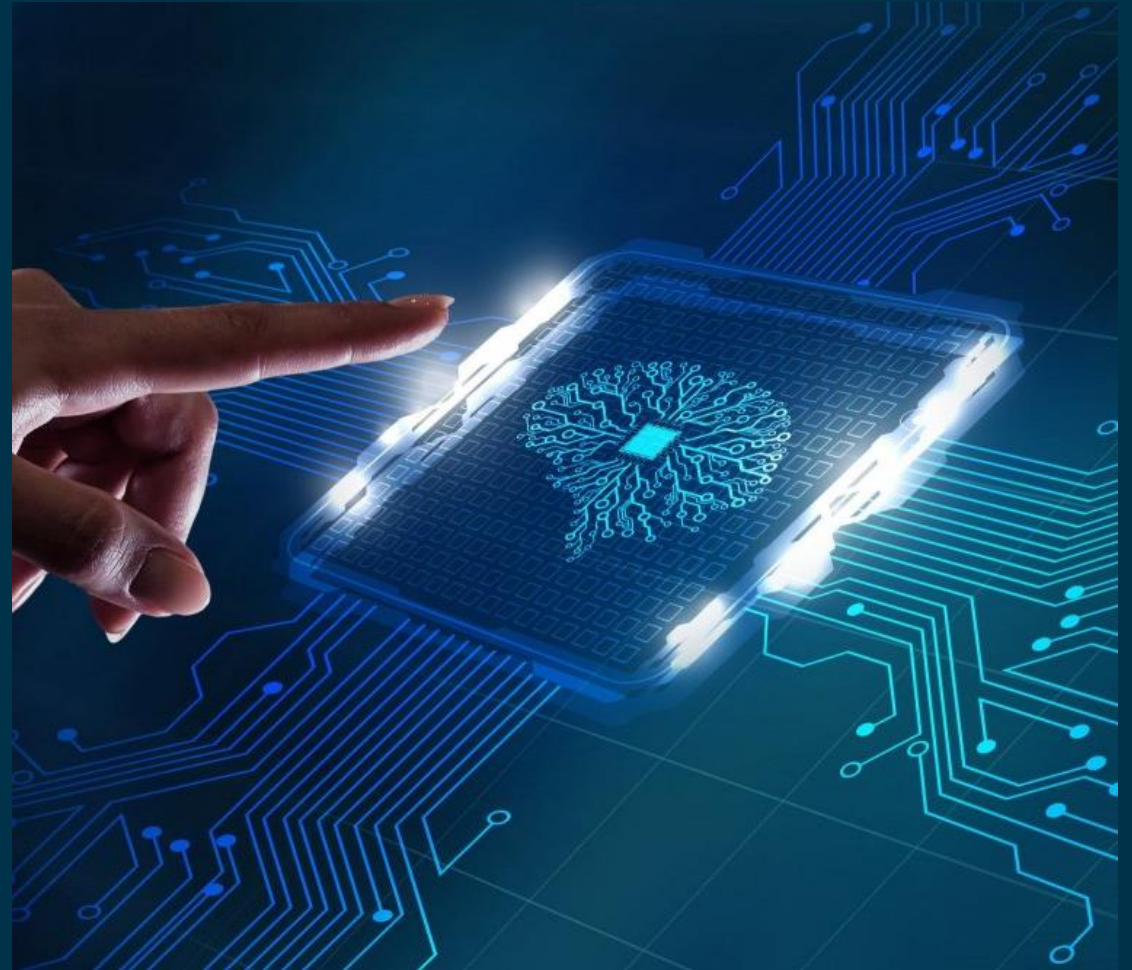
Supporting the scaleup of ventures

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Investment community, Support to SME, Commercialisation Gateway, Industry Alliance, Technical support, etc...

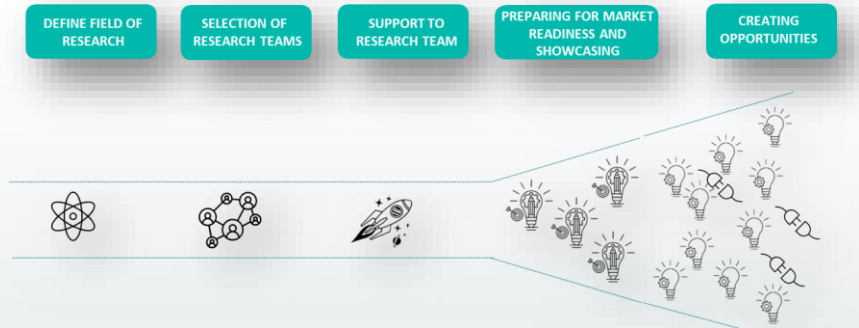
Φ-LAB NET



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

The new Φ-labs:

- will build on the success of the **ESA Φ-lab at ESRIN** and the **ESA BIC common approach** model;
- will focus their applied research in any pre-defined areas that can be space-wide or specialised / monothematic in scope.



The objective is to create a dynamic network of Φ-labs across Europe focusing on delivering **innovation ready for commercialisation** with the ability to disrupt and transform markets.

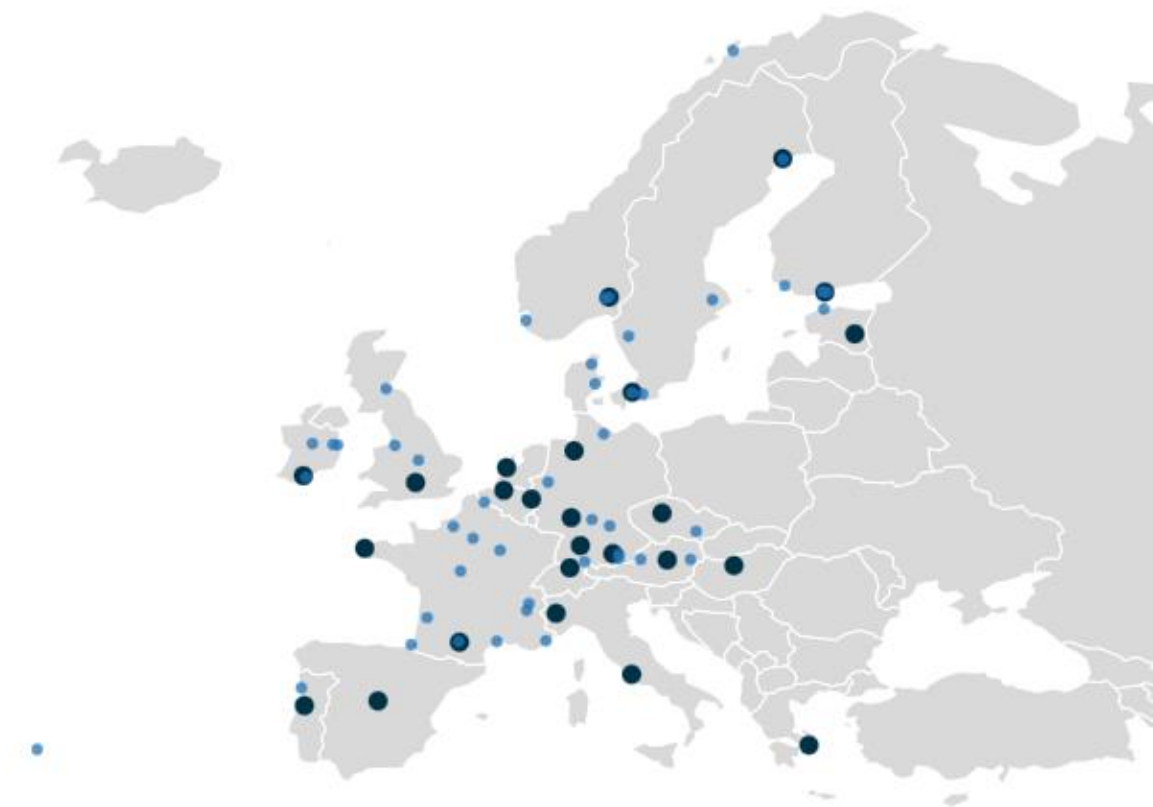
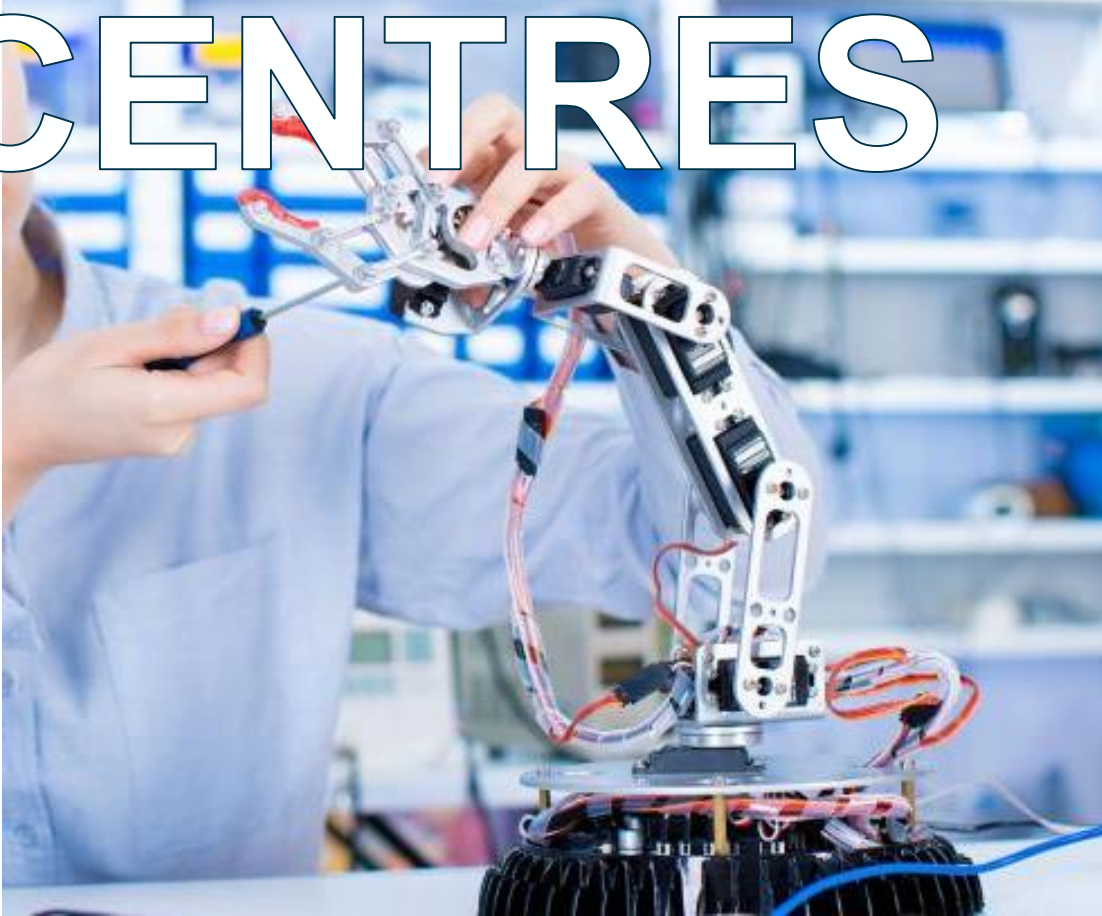
“Under-one-roof” approach teaming up with academia, research centres, national space centres, industry as well as intermediary entities such as ESA BICs, Technology Brokers, Accelerators, and private investors, including Venture Capital organisations.

Identification potential Φ-lab:

ESA has issued a Call for Ideas (CFI) on OSIP (deadline for submission of proposals Friday 30th Sept):

- As a first step, the received information will be used to identify potential suitable candidates where new local Φ-labs could be established;
- In a second stage, in consultation and agreement with the Member States, ESA will initiate the procurement actions for the implementation of the Φ-labs.

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

Key Activities

- **Promote** entrepreneurship and diversify the use of space as a business opportunity;
- **Scout** for talented entrepreneurs with business ideas that have commercial potential;
- **Support** the creation of new space start-up firms active in both upstream and downstream markets, ranging from technology creation and transfer, to applications;
- **Procure** innovative products and services from start-up companies and solidify their business case and adoption by the market.
- **Implementation:** An economic operator within the Participating State is contracted to perform activities as stipulated by the ESA BIC common approach.

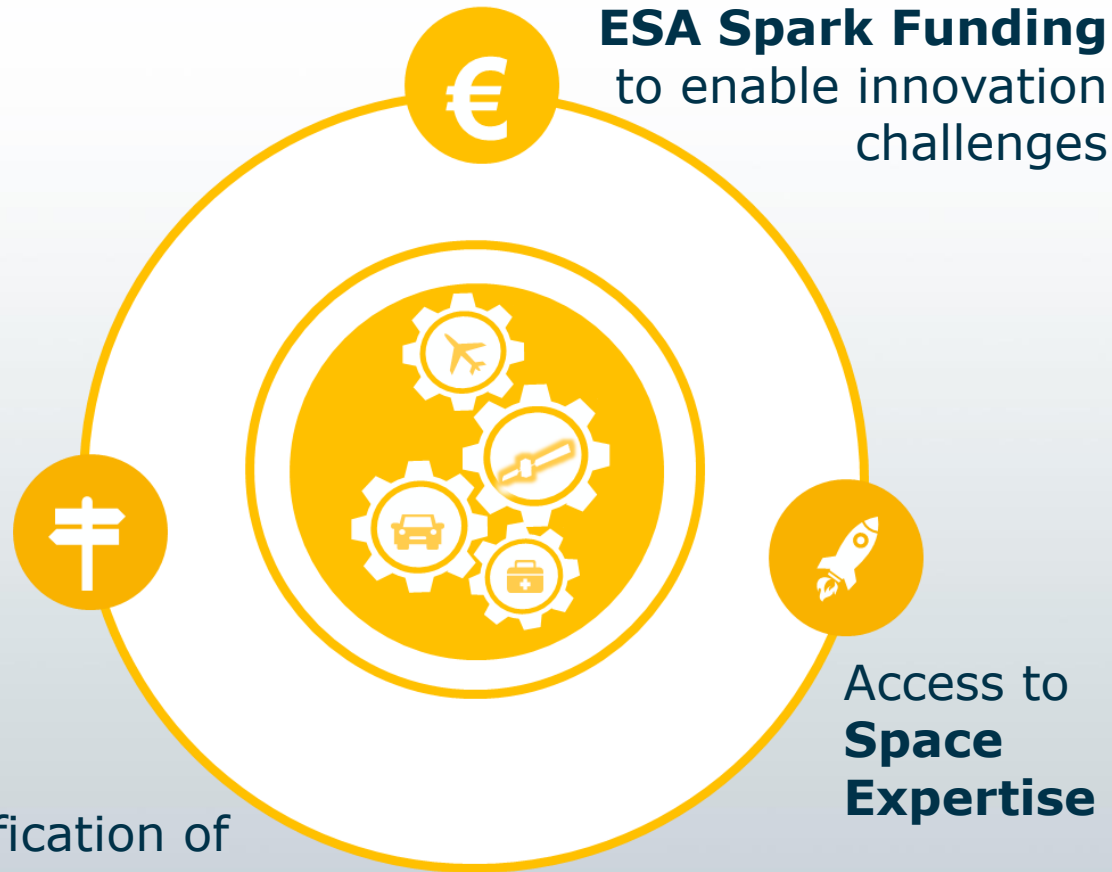
Sub-Components	Core	New	Add-ons
Business Incubation Management	✓		
Promotion, Events and Workshops	✓		
ESA Start-up Incentive Fund	✓		
ESA Technical Support (by TT 2.0)		✓	
Prepare for Space (by TT 2.0)		✓	
Other complementary activities*		✓	
ESA BIC Boost Funding			✓
Pre- and/or Post-Incubation services			✓

* Other complementary activities include priority access to ESA partnerships (i.e. Industry Alliance, Φ-labNET, ESA Brokers, CEMS community, ESA Grand Challenge) and digital infrastructure such as OSIP, ESA MATCH and ESA STAR.

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



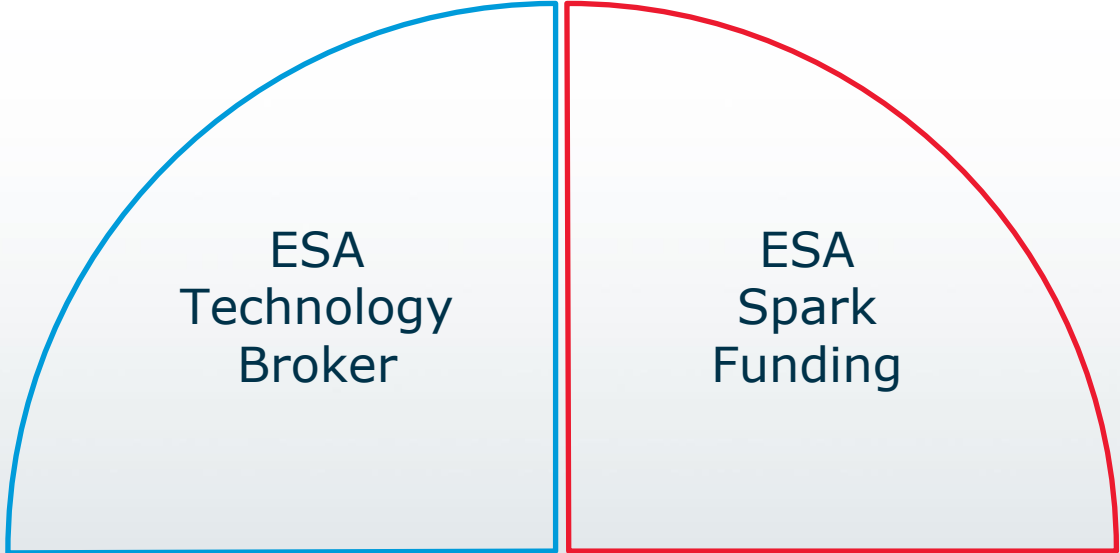
Four Priorities

1. Technology transfer for space and non space sectors Spin-in and out
2. Provide innovation support through Brokers
3. Reinforce the adoption Spark Funding tool
4. Guarantee access to ESA technical support

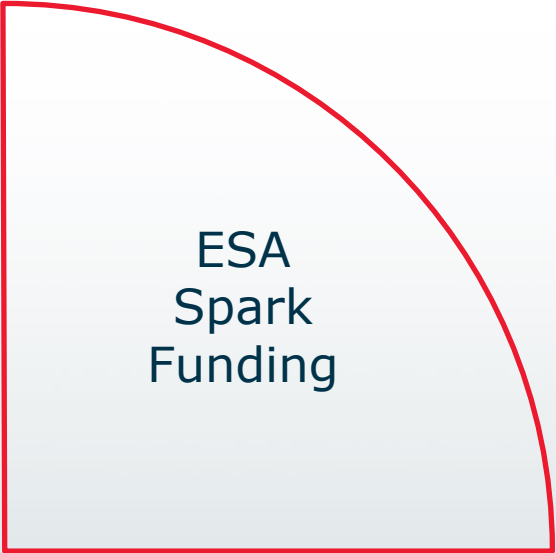
ESA Technology Transfer 2.0



Hands-on support for generating innovation projects between space and non-space entities.



Funding to accelerate the product development process and refine the commercial roadmap



Supporting companies understand space market and ESA programmes.



Supporting SMEs to develop a strategy for the protection and commercialisation of IP generated under ESA or National contracts.



“Supporting SMEs/academia to develop an IP strategy for protection and commercialisation”

Scope

- Prior art search and positioning
- IP strategy for defensive purposes and commercialisation
- First filing

Benefits

- Implemented locally by the ESA Technology Broker (and IP specialist)
- Increase the number of SMEs who develop a commercial IP strategy
- Funding directly from Broker to IP specialist – no need for SME to pre-finance

IP for Commercialisation – Turnkey Service	Costs
Costs	min €100k
Number of Companies Supported	min 10 companies
ESA Technology Broker Management Fee	10%



“Supporting innovative companies understand space market and navigate ESA programmes”

Scope

- Training to navigate ESA, identifying and respond to opportunities.
- Dedicated support to boost their business proposition(financial, managerial, business case)
- Training to understand the space market and understand where they can position themselves within the business and technical landscape.

Benefits

- Implemented locally by the ESA Technology Broker
- Increase the number of new entrants to the space industry
- Help these companies to overcome the barriers to entry of the space industry

Prepare for Space – Turnkey Service	Costs
Prepare for Space – Turnkey Service	min €200k
Number of Companies Supported	min 10 companies
ESA Technology Broker Management Fee	10%

ScaleUp marketplace: 3 simple steps

1. Application

- **OSIP platform:** campaigns launched by ESA or unsolicited proposals by industry (as demand or offer)
- A Jury advises PS about which companies have the most **credible perspective of business growth aiming at upscaling**
- ESA or other (national) institutions can also access the marketplace



2. Matchmaking

- The buyers freely choose the most suitable offer.
- No ESA's role in assessing the offered services or products.
- **ESA can offer technical support, access to test facilities, ground station and laboratories on the marketplace**



3. Procurement

- When there is a match, ESA procures a product/service of the seller using the co-founding provided by the PS of the seller and/or of the buyer.
- The remaining part of the price shall be borne by the buyer
- If the product or service to be procured is not technically mature yet, the payments made by ESA will be made according to the successful **achievements of milestones (maturity gates) pre-agreed with the seller**



Hypothesis for Belgium Subscription to ScaleUp @CM22 (2023-2026)



Components	Min	Max	note
BIC	1.7	2.0	5-6 startup/year, 800keuro to be transferred from ARTES
TT Brokers	1.6	2.0	900 keuro to be transferred from ARTES, includes IP and prepare to ESA
MarketPlace	15	30	Unique opportunity to support Belgium industry scaleup on the IOD/IOV market – cooperation with DE, NO, FR
Total	18.3	34	

TOGETHER WE INVEST AND INNOVATE

commercialisation.esa.int



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YOU SCALE UP!