

# SPACE BUSINESS FORUM

**ESA Industrial Policy Committee**, Tiina Nurmi, Business Finland

**#350 IPC Meeting 11.-12.12.2024 AGENDA**

ESA\_IPC\_OJ\_350\_EN

Selected documents have been uploaded in

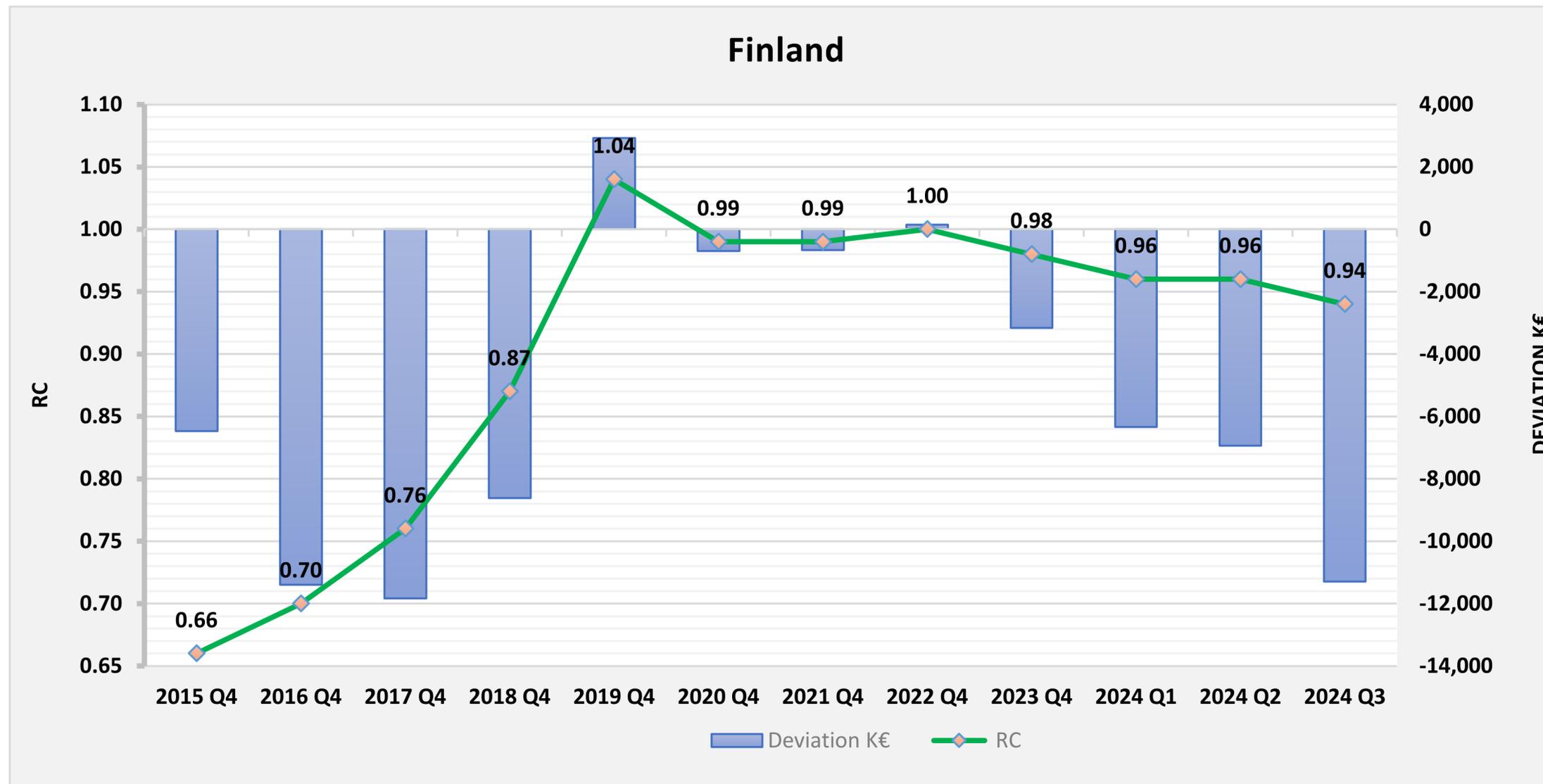
→ “Avaruuskirjeistit” folder ” Space Business Forum 02.12.2024”.

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You can get the right to read them by requesting it from Tiina Nurmi ([tiina.nurmi@businessfinland.fi](mailto:tiina.nurmi@businessfinland.fi)).

# GEOGRAPHICAL DISTRIBUTION OF CONTRACTS Q3/2024

RC	2015-Q4	2016-Q4	2017-Q4	2018-Q4	2019-Q4	2020-Q4	2021-Q4	2022-Q4	2023-Q4	2024-Q1	2024-Q2	2024-Q2
FI	0.66	0.70	0.76	0.87	1.04	0.99	0.99	1.00	0.98	0.96	0.96	0.94



# GEOGRAPHICAL DISTRIBUTION OF CONTRACTS Q3/2024

Finland overall return dropped from 0.96 to 0.94, mainly due to the deficit increase in the Future EO programme and, to a lesser extent, in the Mandatory Activities and in the Space Safety domain.

	2015 Q4	2016 Q4	2017 Q4	2018 Q4	2019 Q4	New Domains Set Q3/Q4-2020						
	2015 Q4	2016 Q4	2017 Q4	2018 Q4	2019 Q4	2020 Q4	2021 Q4	2022 Q4	2023 Q4	2024 Q1	2024 Q2	2024 Q3
<b>MANDATORY PROGRAMMES AND ACTIVITIES</b>	0.34	0.41	0.49	0.77	1.02	0.99	0.95	0.91	0.88	0.88	0.86	0.85
EARTH OBSERVATION	0.65	0.94	0.91	0.88	1.05	1.00	1.03	1.01	1.02	0.99	1.00	0.95
SPACE TRANSPORTATION	0.00	0.20	0.56	0.37	1.09	1.09	1.12	1.04	0.92	0.83	0.84	0.79
HUMAN AND ROBOTIC EXPLORATION	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.50	0.42	0.43	0.40	0.36
TELECOMMUNICATIONS	0.86	0.82	1.15	1.04	1.01	1.00	1.00	1.01	1.02	1.02	1.02	1.02
SPACE SAFETY						0.62	0.73	2.07	1.52	1.50	1.47	1.37
OTHER PROGRAMMES AND ACTIVITIES	1.66	1.06	1.11	1.08	1.06	1.10	1.11	1.07	1.06	0.97	1.01	1.01

MANDATORY PROGRAMMES AND ACTIVITIES	2015 Q4	2016 Q4	2017 Q4	2018 Q4	2019 Q4	2020 Q4	2021 Q4	2022 Q4	2023 Q4	2024 Q1	2024 Q2	2024 Q3
BASIC ACTIVITIES	1.03	0.88	0.97	1.10	1.23	1.33	1.28	1.28	1.26	1.23	1.16	1.15
SCIENTIFIC PROGRAMME	0.04	0.28	0.33	0.65	0.84	0.78	0.74	0.70	0.74	0.75	0.74	0.73

- 4.3 Geographical distribution of contracts Situations as per 30 September 2024 ESA/IPC(2024)13,rev.2 (I)
- 4.4 Geo Return Status of Programmes with Guaranteed Return Situation as per 30 September 2024 ESA/IPC(2024)91,rev.2 (I)

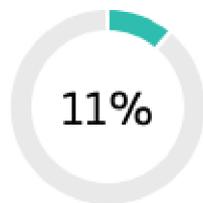
## 4. Industrial and technology policy issues

### The Space Economy in 2023

#### Public Investment in Space

World **106b€** +11%

Europe **11.9b€** +1%

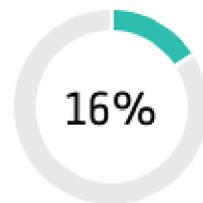


Europe's share of global space public funding

#### Private Investment in Space

World **6b€** -32%

Europe **977M€** -14%



Europe's share of global space private investment

#### Space Activity

**221** launches +18%

**2,940** satellites launched +17%

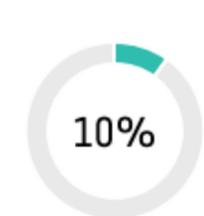
**67** Self-provisioned launches

**+48%** of mass launched

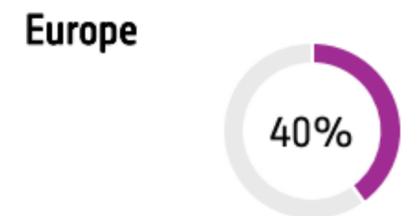
#### Space Upstream Market Value

World **53b€** -19%

Manufacturing ↓  
Launch ↓



Europe's share of global upstream market



Europe's share of its accessible upstream market

#### Space Downstream Market Value

World **358b€** +4%

Satcom ↓  
Navigation ↑  
Earth Observation ↑



Europe **82b€** +4%

Europe's share of global downstream market

Figure 1: Space Economy in 2023 (all growth rates compared to 2022)<sup>4</sup>

# IPC #350

## 5. Procurement matters

### 5.1 Directorate of Technology, Engineering & Quality – D/TEC Work Plans/Procurement Plans

5.1.1 GSTP ELEMENT 1 “DEVELOP” - UPDATE OF THE WORK PLAN/PROCUREMENT PLAN ESA/IPC(2024)61,add.6 (D)

#### Procurement Proposals

5.1.6 DISCOVERY, PREPARATION AND TECHNOLOGY DEVELOPMENT - PREPARATION ELEMENT – Updated Work Plan and Grouped Procurement Proposals ESA/IPC(2024)7,add.1 (D)

### 5.2 Directorate of Connectivity and Secure Communications – (D/CSC) Work Plans/Procurement Plans for Activities Planned for 2025

5.2.1 ARTES 4.0 Strategic Programme Line “Space Systems for Safety and Security” ESA/IPC(2024)194 (D)

5.2.2 ARTES 4.0 Generic Programme Line “Core Competitiveness”, Component A, “Advanced Technology” ESA/IPC(2024)195 (D)

5.2.3 ARTES 4.0 OPTICAL AND QUANTUM COMMUNICATION - SCYLIGHT WORK PLAN 2025 ESA/IPC(2024)196 (D)

5.2.4 ARTES 4.0 Strategic Programme Line “Space for 5G/6G and Sustainable Connectivity” ESA/IPC(2024)197 (D)

# IPC #350

## 5. Procurement matters

### 5.2 Directorate of Connectivity and Secure Communications – (D/CSC)

#### Contract Proposals

- |        |  |                  |     |
|--------|--|------------------|-----|
| 5.2.11 | Element 1 of the ESA Programme Related to EU Secure Connectivity                       | ESA/IPC(2024)198 | (D) |
| 5.2.12 | HydRON Demonstration System Phase B2/C/D/E – LEO Multi-Orbit Extension Layer (HDS-E#2) | ESA/IPC(2024)221 | (D) |

### 5.5 Directorate of Science – D/SCI

#### Procurement Proposals

- |       |   |                        |     |
|-------|---|------------------------|-----|
| 5.5.1 | Flight Phasemeter Control Unit (PCU) for the LISA Programme’s Phasemeter System | ESA/IPC(2024)1,add.121 | (D) |
|-------|---|------------------------|-----|

#### Contract Proposal

- |       |  |                        |     |
|-------|--|------------------------|-----|
| 5.5.5 | Design, Development and Support to Launch and Post Launch Operations (Phase B2/C/D/E1) of the LISA Spacecrafts | ESA/IPC(2024)205,rev.1 | (D) |
|-------|--|------------------------|-----|

### 5.6 Directorate of Human and Robotic Exploration – D/HRE

#### Work Plan/Procurement Plan

- |       |   |                  |     |
|-------|---|------------------|-----|
| 5.6.1 | Procurement Plan for European Exploration Envelope Programme Terrae Novae | ESA/IPC(2024)206 | (D) |
|-------|---|------------------|-----|

# IPC #350

## 5. Procurement matters

### 5.9 Directorate of Commercialisation, Industry and Competitiveness – (D/CIC) Information Item

5.9.2 Scale Up Programme Quarterly Status Report

ESA/IPC(2024)185 (I)

5.9.3 ESA BIC Network Survey 2023: Executive Summary

ESA/IPC(2024)186 (I)

## 7. Information documents

7.6 Status and outlook for GSTP

ESA/IPC(2024)220 (I)

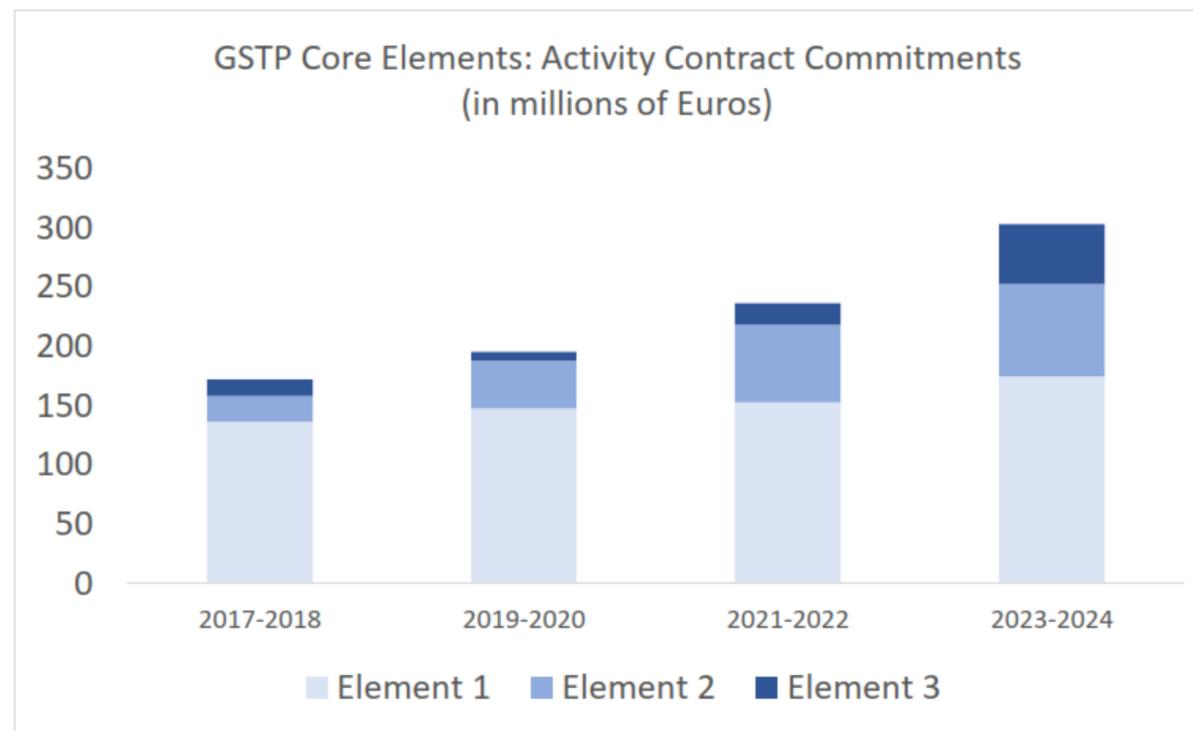


Figure 1. Evolution of Contract Commitments in GSTP

# SPACEFINLAND

SpaceFinland gives a look at Finnish space sector companies and research as well as the Finnish space administration

**Learn about Finland's space activities**

# The Space Business Forum

The Space Business Forum is a community of Finnish space operators that meets five times a year. The meetings cover current and future issues in space business and research; technology-related issues, and initiatives and frameworks for international cooperation within the European Space Agency (ESA), the EU and outside Europe. The main contribution of the meetings will be presentations by companies and research organizations, and in particular discussions and networking.

The Space Business Forum serves as an information-sharing platform for the entire Finnish space network. This includes the distribution of official documentation to space actors and, in particular, the communication of industry and research needs to space administrators and international actors.

Participation in the Space Business Forum is free of charge, but the Space Business Forum reserves the right to admit members.

**More information:** Tiina Nurmi/Business Finland - [tiina.nurmi\(at\)businessfinland.fi](mailto:tiina.nurmi@businessfinland.fi)

**Sign up for the mailing list:** [greta.neffling\(at\)businessfinland.fi](mailto:greta.neffling@businessfinland.fi)

## **Preliminary dates for Space Business Forums for 2025:**

- Monday **24 February 2025**, 10:00-13:00
- Thursday **24 April 2025**, 10:00-13:00
- Wednesday **18 June 2025**, 10:00-13:00
- Thursday **18 September 2025**, 10:00-13:00
- Friday **14 November 2025**, 10:00-13:00

## Next event on 2 December 2024:

**Venue:** Team Finland House, address: Porkkalankatu 1, 00180 Helsinki (Ruoholahti)

[Agenda](#)

[Registration](#) 

## Previous events:

 [Space Business Forum 25.9.2024](#)

 [Space Business Forum 17.6.2024](#)

 [Space Business Forum 16.4.2024](#)

 [Space Business Forum 8.3.2024](#)

 [Space Business Forum 22.11.2023](#)