

SPACE BUSINESS FORUM

ESA Industrial Policy Committee, Tiina Nurmi, Business Finland

#352 IPC Meeting 11.-12.3.2025 AGENDA

ESA_IPC_OJ_352_EN

Selected documents have been uploaded in

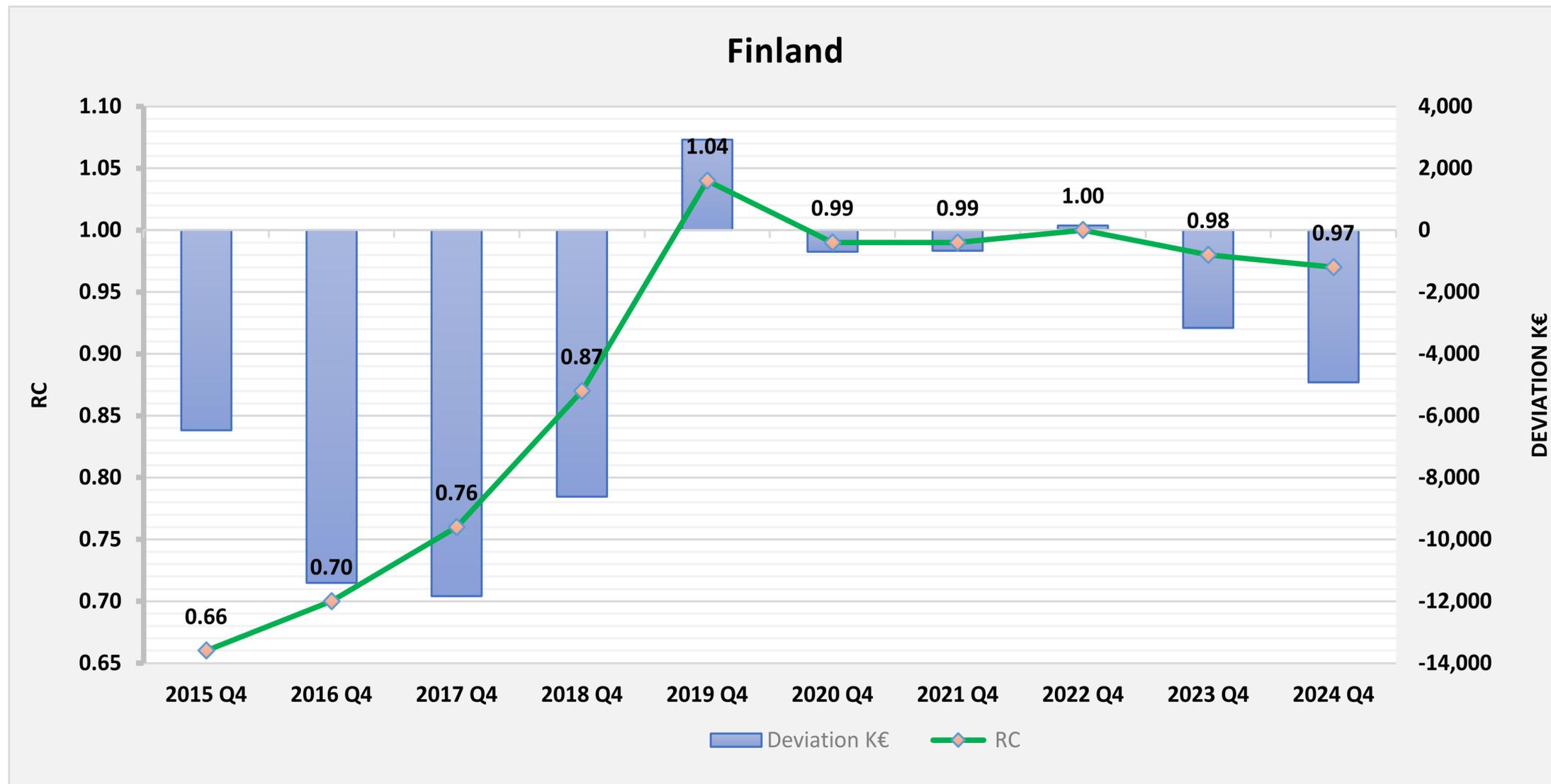
→ “Avaruusdokumentit” folder ” Space Business Forum 24.02.2025”.

Public access to documents is restricted in accordance with ESA rules.

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

GEOGRAPHICAL DISTRIBUTION OF CONTRACTS Q4/2024

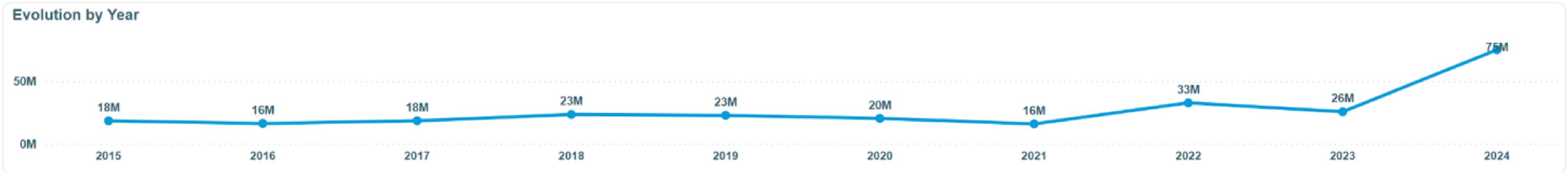
RC	2015-Q4	2016-Q4	2017-Q4	2018-Q4	2019-Q4	2020-Q4	2021-Q4	2022-Q4	2023-Q4	2024-Q1	2024-Q2	2024-Q3	2024-Q4
FI	0.66	0.70	0.76	0.87	1.04	0.99	0.99	1.00	0.98	0.96	0.96	0.94	0.97



GEOGRAPHICAL DISTRIBUTION OF CONTRACTS Q4/2024

Contracts Awarded - Finland

Period of Analysis: 2024-Q4
Commitment Date Range: 01/01/2015 - 31/12/2024
N. of Contracts awarded: 499
N. of Entities involved: 119



GEOGRAPHICAL DISTRIBUTION OF CONTRACTS Q4/2024

FINLAND - Comparision between Q3-2024 and Q4-2024	Q3-2024			Q4-2024			DELTA (K€)
	W (K€)	RC	Imbalance (K€)	W (K€)	RC	Imbalance (K€)	
IP Program Domain Name							
MANDATORY PROGRAMMES AND ACTIVITIES Total	52,195	0.85	-9,559	67,364	0.97	-1,745	7,814
EARTH OBSERVATION Total	56,286	0.95	-2,871	57,945	0.94	-3,411	-539
SPACE TRANSPORTATION Total	1,811	0.79	-471	1,811	0.79	-471	0
HUMAN AND ROBOTIC EXPLORATION Total	841	0.36	-1,499	841	0.33	-1,681	-182
TELECOMMUNICATIONS Total	27,633	1.02	416	29,282	1.02	443	26
SPACE SAFETY Total	9,527	1.37	2,557	9,936	1.26	2,035	-522
OTHER PROGRAMMES AND ACTIVITIES Total	18,753	1.01	129	24,498	1.00	-90	-220
OVERALL TOTAL	167,047	0.94	-11,298	191,678	0.97	-4,921	6,377

4.6	Geographical distribution of contracts Situation as per 31 December 2024	ESA/IPC(2024)13,rev.3	(I)
4.7	Geo Return Status of Programmes with Guaranteed Return Situation as per 31 December 2024	ESA/IPC(2024)91,rev.3	(I)

IPC #352

4. Industrial and technology policy issues

4.3 Conclusions of the 2nd Cycle 2024 Harmonisation Meetings

ESA/IPC(2025)32

(D)



Composite
Materials



Model Based
for System
Engineering



Electromagnetic
Compatibility



Technologies for
Fluid Mechanics



CubeSat
Propulsion

IPC #352

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(2025)61,add.1	(D)
5.1.4	TECHNOLOGY DEVELOPMENT ELEMENT - UPDATE OF THE TDE WORK PLAN / PROCUREMENT PLAN 2023-2024	ESA/IPC(2023)3,add.5	(D)

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

5.9.3	ScaleUp Programme Annual Status Report 2024	ESA/IPC(2025)45	(I)
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7. Information documents

7.4	Socio-Economic Impact of ESA Programmes 2025	ESA/IPC(2025)47	(I) *
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7. Information documents

7.3 Report on the Space Economy 2025

ESA/IPC(2025)46

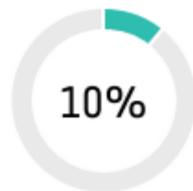
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The Space Economy in 2024

Public Investment in Space

World **122b€** +9%

Europe **12.6b€** +2%

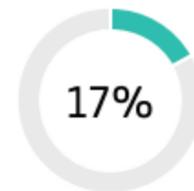


10% Europe's share of global space public funding

Private Investment in Space*

World **8b€** -34%

Europe **1.4€** +67%



17% Europe's share of global space private investment

Space Activity

259 launches +18%

2,877 satellites launched -2%

90 Self-provisioned launches for Starlink

+41% of mass launched

Space Upstream Market Value

World **63b€** +22%

Manufacturing ↑
Launch ↑

Europe **6%**
Europe's share of global upstream market

Europe **33%**
Europe's share of its accessible upstream market

Space Downstream Market Value

World **408b€** +9%

Satcom ↑
Navigation ↑
Earth Observation ↑

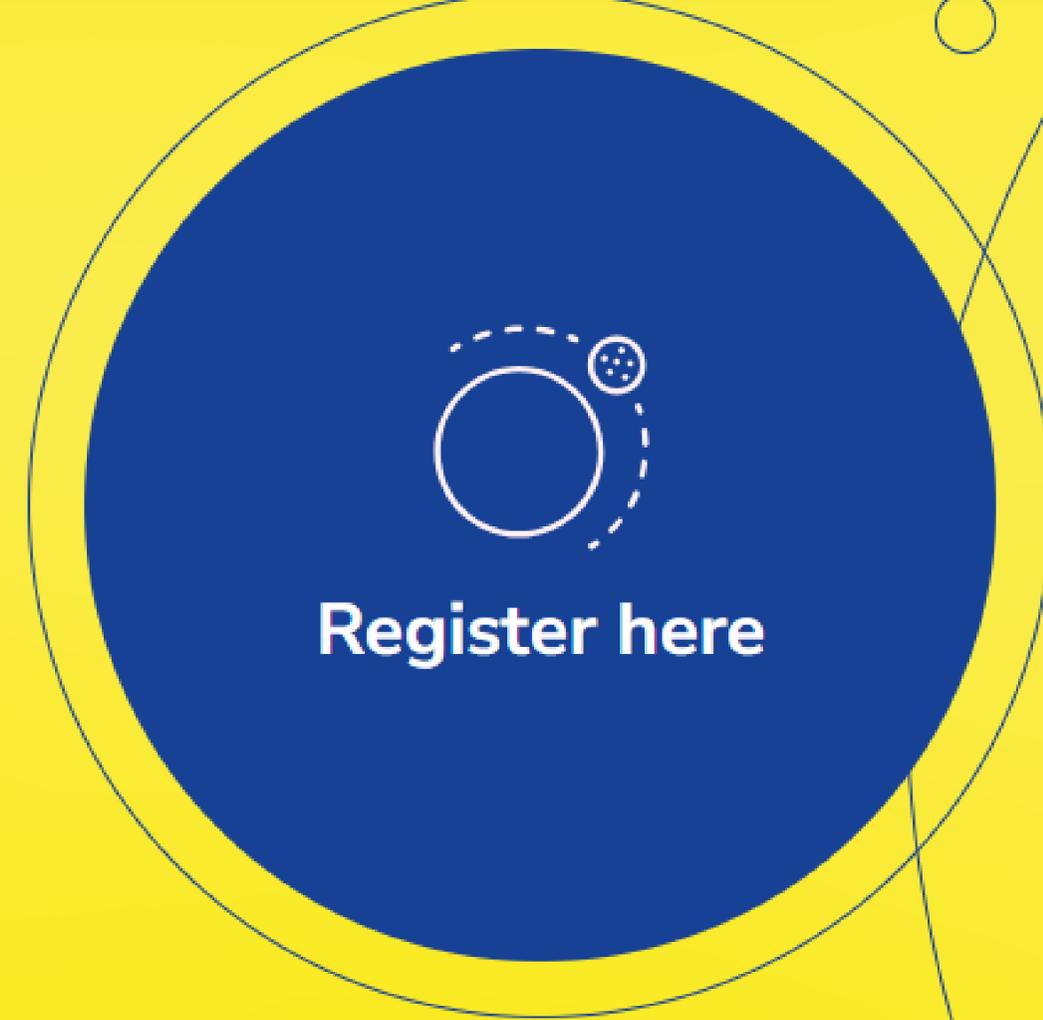
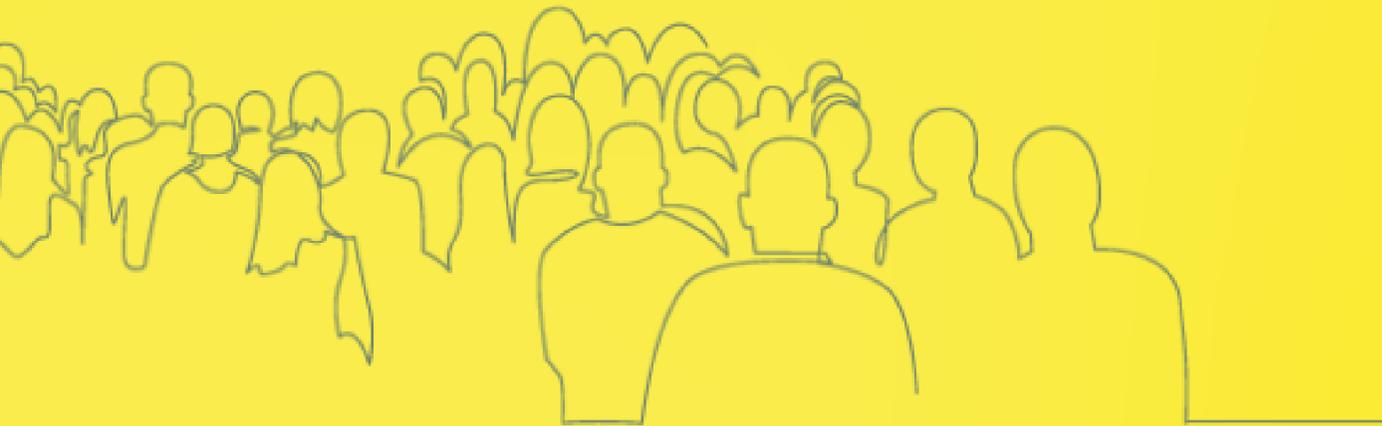
Europe **78b€** +6%
19% Europe's share of global downstream market

Figure 1: Space Economy in 2024 (all growth rates compared to 2023)²¹

*Private investment in the upstream segment only

EUSPA Industry Days

25-26 March - Prague and
Online



<https://euspa-idays.eu/>

Industry Days 2025 is designed to offer participants a comprehensive understanding of EUSPA's objectives, upcoming developments, and the latest calls for tenders.

CM25 Industry Event

3 - 4 April 2025 | ESA-ESTEC



On **3-4 April 2025**, ESA is organising an information event for industry dedicated to the upcoming ESA Council at Ministerial Level (CM25) in November.

During this two-day event at ESA/ESTEC (Noordwijk, The Netherlands), Programme Directorates will present current plans and considerations with regard to their CM25 programme proposals and will engage in exchanges with industry.

The objective of the event is to inform industry and seek feedback to consolidate the proposals, support the decisions to be made at CM25 and improve the implementation after CM25.

The event is open to industrial entities (**1 representative per company**) and industry associations (**1 representative each**) from ESA Member States, Associate States and Cooperating States. Delegations are also invited to join (**1 representative per Member State**).

Registration is on a first-come, first served basis. **Please note that places are limited.**

Please take note of all ESTEC [access requirements](#).

Thursday, April 3, 2025

8:30 AM - 9:30 AM	Registration/Welcome
9:30 AM - 9:35 AM	<u>Opening</u> <u>Géraldine Naja, Director of Commercialisation, Industry and Competitiveness</u> <u>Dietmar Pilz, Director of Technology, Engineering & Quality / ESTEC Head of Establishment</u>
9:35 AM - 9:50 AM	<u>Welcome Address</u> <u>Josef Aschbacher, ESA Director General</u>
9:50 AM - 10:05 AM	<u>CM25 Preparation Status</u> <u>Directorate of Strategy, Legal and External Affairs (SLE)</u>
10:05 AM - 11:35 AM	<u>ESA Connectivity and Secure Communications: Connectivity for Europe, for Planet Earth and Beyond</u> <u>Laurent Jaffart, Director of Connectivity and Secure Communications</u>
11:35 AM - 1:05 PM	<u>Navigation Programme Proposals at CM25</u> <u>Javier Benedicto, Director of Navigation</u>
1:05 PM - 2:00 PM	Lunch - Day 1
2:00 PM - 3:30 PM	<u>Human and Robotic Exploration CM25 Programme Proposal and Industrial Opportunities</u> <u>Daniel Neuenschwander, Director of Human and Robotic Exploration</u>
3:30 PM - 4:00 PM	PM Coffee Break - Day 1
4:00 PM - 5:00 PM	<u>GSTP Outlook</u> <u>Dietmar Pilz, Director of Technology, Engineering & Quality</u>
5:00 PM - 6:00 PM	<u>The Access programme proposal for CM25</u> <u>Géraldine Naja, Director of Commercialisation, Industry and Competitiveness</u>
6:00 PM - 8:00 PM	Networking Reception

Friday, April 4, 2025

8:30 AM - 9:00 AM	Arrival/Welcome
9:00 AM - 10:30 AM	<u>Big Science, Big Business, Big Breakthroughs: Reach for the Skies with the ESA Science Programme</u> <u>Carole Mundell, Director of Science</u>
10:30 AM - 12:00 PM	<u>Earth Observation for a more Sustainable and Resilient Planet</u> <u>Simonetta Cheli, Director of Earth Observation Programmes</u>
12:00 PM - 12:45 PM	Lunch - Day 2
12:45 PM - 2:15 PM	<u>Reinforced European Autonomy and Resilience through Space Transportation at CM25</u> <u>Toni Tolker Nielsen, Acting Director of Space Transportation</u>
2:15 PM - 2:30 PM	PM Coffee Break - Day 2
2:30 PM - 4:00 PM	<u>ESA Space Safety Programme: Protecting our Planet, Humanity and Assets from Space Hazards</u> <u>Rolf Densing, Director of Operations</u>

Note: Agenda is subject to change.



ESA 50 years of innovation

An event by



Florence / Innovation Center di Fondazione CR Firenze

20-22 May 2025

Celebrate 50th anniversary of ESA Basic R&D activities

For information, agenda and registration visit: <https://esa50innovation.eu/>

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](https://spacefinland.fi/en/front-page)

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
- Wednesday **23 April 2025**, 10:00-13:00 (note the changed time)
- 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 24 February 2025:

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

[Agenda](#)

[Registration](#) 

Previous events:

-  Space Business Forum 2.12.2024
-  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