

SPACE BUSINESS FORUM

ESA Industrial Policy Committee, Tiina Nurmi, Business Finland

#354 IPC Meeting 25.-26.6.2025 AGENDA

ESA_IPC_OJ_354_EN

Selected documents have been uploaded in

→ “Avaruusdokumentit” folder ” Space Business Forum 18.06.2025”.

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).

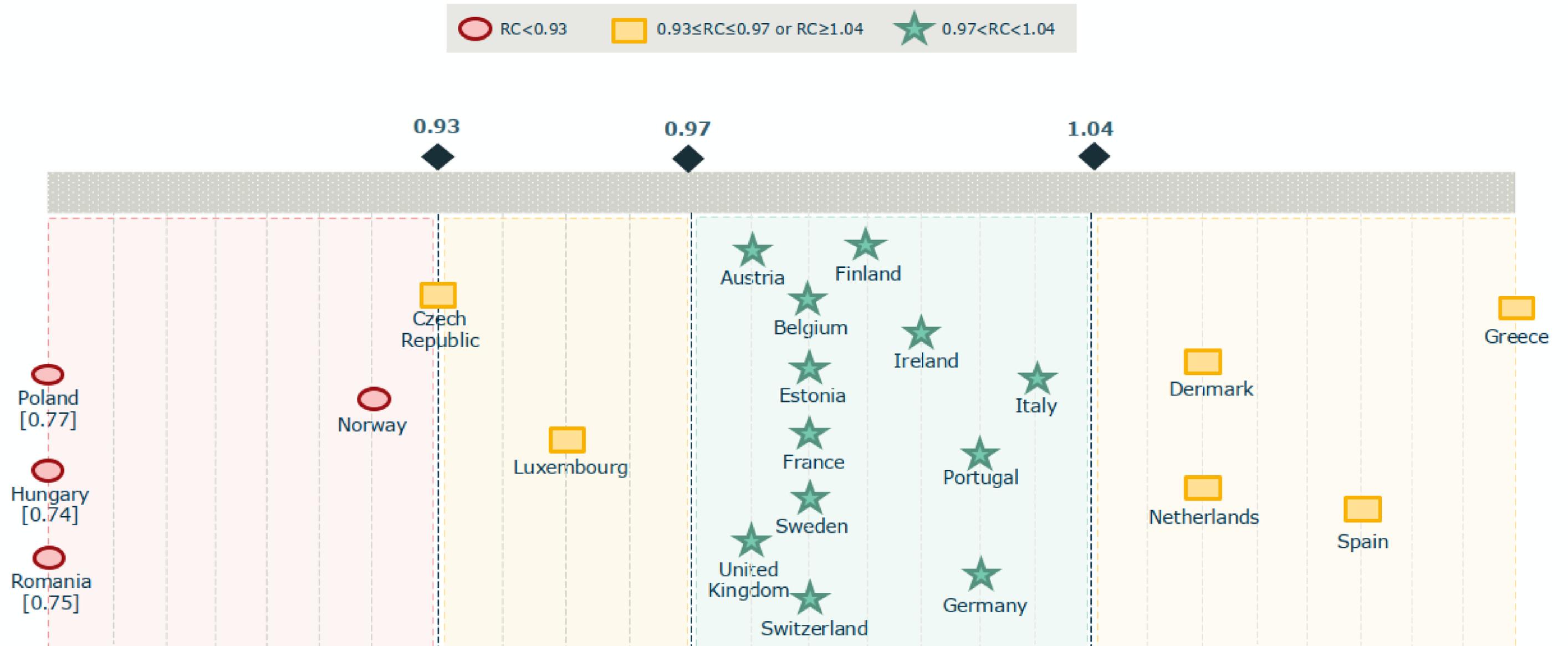
GEOGRAPHICAL DISTRIBUTION OF CONTRACTS Q1/2025

RC 2015-Q4 2016-Q4 2017-Q4 2018-Q4 2019-Q4 2020-Q4 2021-Q4 2022-Q4 2023-Q4 2024-Q4 2025-Q1

FI 0.66 0.70 0.76 0.87 1.04 0.99 0.99 1.00 0.98 0.97 1.00

	Contract Unweighted	Value (K€) Weighted	Scale %	Ideal (K€)	RC	Deviation (K€)
ESA OVERALL RETURN COEFFICIENTS	202,441	200,651	0.60	201,021	1.00	- 370
MANDATORY PROGRAMMES AND ACTIVITIES	69,028	68,444	1.41	70,099	0.98	- 1,655
Scientific Programme	46,560	46,266	1.39	51,858	0.89	- 5,592
Basic Activities	22,468	22,178	1.33	18,241	1.22	+ 3,937

GEOGRAPHICAL DISTRIBUTION OF CONTRACTS Q1/2025



IPC #354

4. Industrial and technology policy issues

4.6 Conclusions of the 1st Cycle 2025 Harmonisation Meetings

ESA/IPC(2025)89 (D)



On-Board
Radio
Navigation
Receivers



Enabling
Artificial
Intelligence for
Space System
Applications



TT&C
Transponders
and Payload
Data
Transmitters



Critical Active RF
Technologies



Functional
Verification
and Mission
Operations
Systems

IPC #354

4. Industrial and technology policy issues

4.7 Harmonisation Work Plan 2026

ESA/IPC(2025)90 (D)

Table 3-1 List of Technologies for Harmonisation in 2026

1st cycle 2026		
Acronym	Title	Revisit
ABBFM	Actuators Building Blocks for Mechanisms	2021
PYRO	Pyrotechnic Devices (within release mechanisms)	2020
PCBEA	Printed Circuit Boards and Electronic Assembly Technologies	2022
ADMA	Additive Manufacturing	2021
MNTE	Micro and Nano Technologies – MEMS Pressure Sensors, MOEMS and RF-MEMS	2020

2nd cycle 2026		
Acronym	Title	Revisit
GSTE	Ground Station Technology	2021
OBDHM	On-Board Computers, Data Handling Systems and Microelectronics	2021
AVES	Avionics Embedded Systems	2021
OBSW	On-Board Software	2020
RADEE	Radiation Environment and Effects	2021

1st Cycle	Harmonisation Meeting	17-19 February 2026
	THAG Meeting	14-15 April 2026

2nd Cycle	Harmonisation Meeting	19-21 May 2026
	THAG Meeting	08-09 September 2026

IPC #354

4. Industrial and technology policy issues

4.18 Draft General Support Technology Programme Proposal for CM25

ESA/IPC(2024)223,rev.2 (C)



IPC #354

4. Industrial and technology policy issues

4.8	Geographical distribution of contracts Situation as per 31 March 2025	ESA/IPC(2025)13	(I)
4.9	Geo Return Status of Programmes with Guaranteed Return Situation as per 31 March 2025	ESA/IPC(2025)91	(I)
4.11	Harmonisation of industrial policy requirements in ESA ITTs	ESA/IPC(2025)49,rev.1	(D)
4.13	Draft updated Programme Proposal for the ACCESS Programme*	ESA/IPC(2025)41,rev.2	(C)

5. Procurement Matters

5.1 Directorate of Technology, Engineering & Quality – D/TEC Procurement Proposals

5.1.2	GSTP ELEMENT 1 “DEVELOP” - UPDATE OF THE WORK PLAN/PROCUREMENT PLAN	ESA/IPC(2025)61,add.3	(D)
5.1.4	DISCOVERY, PREPARATION AND TECHNOLOGY DEVELOPMENT – PREPARATION ELEMENT Updated Work Plan and Grouped Procurement Proposals	ESA/IPC(2024)7,add.2	(D)
5.1.5	GSTP ELEMENT 2 “MAKE” PROCUREMENT PROPOSALS	ESA/IPC(2025)62,add.2	(D)
5.1.6	Satellite Network of Experts VI (SatNEx VI)	ESA/IPC(2025)1,add.62	(D)

IPC #354

5. Procurement Matters

5.3 Directorate of Earth Observation – D/EOP Procurement Proposals

5.3.5 Grouped Procurement Proposal Extension of ground segment contracts in support to SMOS Mission extension ESA/IPC(2025)1,add.65 (D)

5.5 Directorate of Science – D/SCI Work Plan/Procurement Plan

5.5.1 Science Programme Technology Development Plan: Programme of Work for 2025, 2026 and 2027, and Related Procurement Plan ESA/IPC(2025)81 (D)

5.6 Directorate of Operations – D/OPS Procurement Proposal

5.6.2 2nd Space Weather Nanosatellite ESA/IPC(2025)1,add.61 (D)

5.8 Directorate of Commercialisation, Industry and Competitiveness – D/CIC Information Item

5.8.3 ScaleUp Programme Status Report 2025 Q1 ESA/IPC(2025)97 (I)

INVITATION

TEAM FINLAND VISIT TO AUSTRALIA 3-6 NOVEMBER 2025

Business Finland, in cooperation with the Team Finland network, the Business Finland Defense and Digital Resilience Program and Finnish Defence and Aerospace Industries - PIA, invites Finnish companies to join this Team Finland visit to Sydney, Australia, on 3–6 November 2025. The visit is arranged in conjunction with Indo Pacific 2025 – International Maritime Exposition and **led by Mr. Arto Haapea, Ambassador of Finland to Australia and New Zealand.**

This visit offers Finnish companies in defence and dual-use technology a unique opportunity to engage with key stakeholders across the Australian and New Zealand defence and security sectors, including government agencies, industry, and research organisations. While bi-annual Indo Pacific 2025 is the region's premier naval and maritime defence exhibition, the event has become a central platform for broader defence and security engagement across all domains.

For whom?

This visit is highly relevant for Finnish defence and dual-use technology companies, particularly those active in:

- Maritime and naval systems
- Situational awareness and C4ISR
- Cyber and digital defence
- Sustainment and deployable infrastructure
- Space, satellite, or surveillance technologies

Both new market entrants and companies already active in Australia or New Zealand are welcome to join.

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
- 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 18 June 2025:

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

[Agenda](#)

[Registration](#) [↗](#)

Previous events:

[+ Space Business Forum 23.4.2025](#)

[+ Space Business Forum 24.2.2025](#)

[+ 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](#)