

# SPACE BUSINESS FORUM

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

**#355 IPC Meeting 24.-25.9.2025 AGENDA**

ESA\_IPC\_OJ\_355\_DRAFT\_\_EN

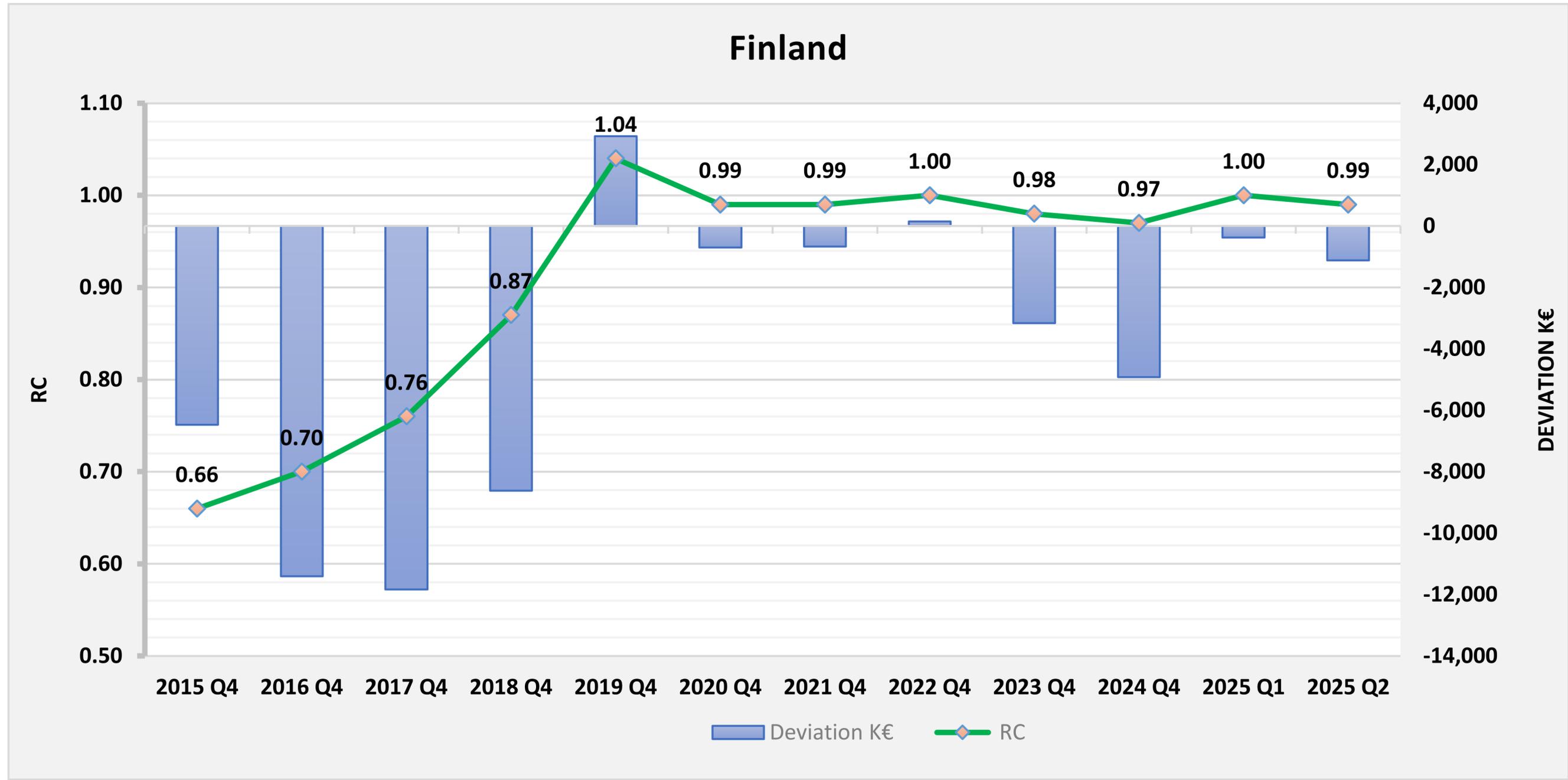
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→ “Avaruusdokumentit” folder ” Space Business Forum 18.09.2025”.

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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 Q2/2025



# GEOGRAPHICAL DISTRIBUTION OF CONTRACTS Q2/2025

DOMAIN							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 Q4	2025 Q1	2025 Q2
<b>MANDATORY PROGRAMMES AND ACTIVITIES</b>	0.34	0.41	0.49	0.77	1.02	0.99	0.95	0.91	0.88	0.97	0.98	0.96
EARTH OBSERVATION	0.65	0.94	0.91	0.88	1.05	1.00	1.03	1.01	1.02	0.94	0.98	1.01
SPACE TRANSPORTATION	0.00	0.20	0.56	0.37	1.09	1.09	1.12	1.04	0.92	0.79	0.82	0.80
HUMAN AND ROBOTIC EXPLORATION	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.50	0.42	0.33	1.25	0.86
TELECOMMUNICATIONS	0.86	0.82	1.15	1.04	1.01	1.00	1.00	1.01	1.02	1.02	1.02	1.01
SPACE SAFETY						0.62	0.73	2.07	1.52	1.26	1.28	1.22
OTHER PROGRAMMES AND ACTIVITIES	1.66	1.06	1.11	1.08	1.06	1.10	1.11	1.07	1.06	1.00	0.99	0.98

MANDATORY PROGRAMMES AND ACTIVITIES	2015 Q4	2016 Q4	2017 Q4	2018 Q4	2019 Q4	2020 Q4	2021 Q4	2022 Q4	2023 Q4	2024 Q4	2025 Q1	2025 Q2
Basic Activities	1.03	0.88	0.97	1.10	1.23	1.33	1.28	1.28	1.26	1.23	1.22	1.20
Scientific Programme		0.28	0.33	0.65	0.84	0.78	0.74	0.70	0.74	0.88	0.89	0.88

# IPC #355

## 4. Industrial and technology policy issues

- |     |  |                           |
|-----|--|---------------------------|
| 4.6 | Updated Programme Proposal for the ACCESS Programme* | ESA/IPC(2025)41,rev.3 (I) |
| 4.7 | Draft Declaration on the ACCESS Programme*           | ESA/IPC(2025)39,rev.3 (D) |
| 4.8 | Draft Implementing Rules for the ACCESS Programme*   | ESA/IPC(2025)40,rev.4 (D) |

### Programme Structure

#### Element 1 SCALE-UP

- i. Component 1 Phi-LabNET
- ii. Component 2 ESA BICs
- iii. Component 3 ESA Technology Brokers
- iv. Component 4 ESA Business Accelerators
- v. Component 5 ESA Marketplace.

#### Element 2 Business Applications and Space Solutions (BASS)

- i. Component 1 Business Applications
- ii. Component 2 Business Ambassadors.

# IPC #355

- 4.10 Draft General Support Technology Programme Proposal for CM25
- 4.11 Draft Revised Declaration on the General Support Technology Programme (GSTP)
- 4.12 Draft Revised General Support Technology Programme (GSTP) Implementing Rules

- ESA/IPC(2024)223,rev.3 (C)
- ESA/IPC(2025)59,rev.2 (D)
- ESA/IPC(2025)60,rev.2 (D)



# IPC #355

4.14 Revision of the Implementing Rules on the Advanced Research in Telecommunications Systems (ARTES) 4.0 Programme for CM25

ESA/IPC(2025)140 (D)



The Programme Proposal for the ARTES 4.0 Programme is published under reference ESA/JCB(2024)71,REV.4. The draft revised Programme Declaration is published under reference ESA/JCB(2025)28,REV.3.

# IPC #355

4.15 Revision of the Implementing Rules for the Moonlight Programme for CM25 ESA/IPC(2025)141 (D)

## **Programme Structure**

Element 1: Moonlight

Element 2: ASSIGN (Advancing Solar System Internet and GrouNd)

The Programme Proposal for the Moonlight and ASSIGN Programme is published under reference ESA/JCB(2024)302,REV.4.  
The draft revised Programme Declaration is published under reference ESA/JCB(2025)301,REV.3.

4.16 Draft revision of the Implementing Rules of the Future Earth Observation Programme (FutureEO) ESA/IPC(2025)166 (D)

## **Programme Structure**

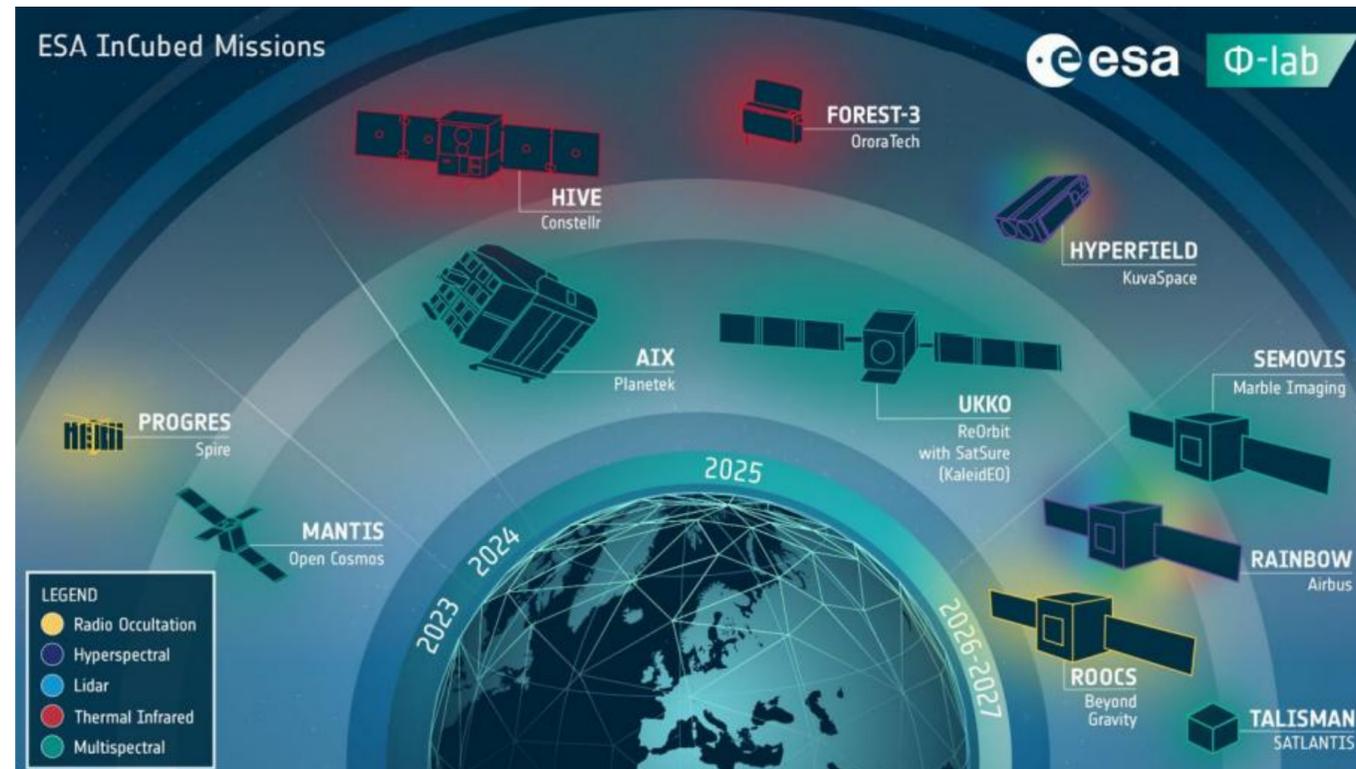
1. The Research Mission Component (phases B/C/D/E1 of the 'Research Missions')

2. The Development and Exploitation Component

The Proposal for the third segment of Future-EO Period-1 is published under reference ESA/PB-EO(2025)7,REV.2.  
The draft revised Programme Declaration is published under reference ESA/PB-EO(2025)8,REV.2.

# IPC #355

4.17 Draft revision of the Implementing Rules of the InCubed Element of the European Earth Watch Programme ESA/IPC(2025)167 (D)



4.18 Draft Revised Space Safety Programme Implementing Rules ESA/IPC(2025)132 (D)

The S2P Declaration is published under reference ESA/PB-SSA(2025)3,REV.2.  
The document under reference ESA/PB-SSA75/RoomDoc(2025)1, offers further context on some of the proposed modifications.

4.19 Draft Revised Implementing Rules for the European Exploration Envelope Programme ESA/IPC(2025)144 (D)

The corresponding draft revised Declaration is published under reference ESA/PB-HME(2025)10,REV.3.

# IPC #355

## 5. Procurement Matters

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

5.9.3 ScaleUp Programme Status Report 2025 Q2

ESA/IPC(2025)129 (I)

## 7 INFORMATION NOTES

7.15 Report on the High-Level Forum with Industry, the Competitiveness Workshop, the Midcap Forum and the SME Forum

ESA/IPC(2025)99 (I)

7.16 2024 ESA Supplier Performance Evaluation

~~ESA/IPC(2025)164 (I)~~



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# 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.

*See also: [The Space Business Forum Webinars Series](#)*

**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 September 2025:**

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

[Agenda](#)

[Registration](#) 

## **Previous events:**

 [Space Business Forum 18.6.2025](#)

 [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](#)

# The Space Business Forum Webinars Series

*The new webinar series has been created to support and complete our live Space Business Forums.*

The webinars support the live events by completing different current and future topics in space business and research. The main contribution of the meetings will be presentations by companies and research organizations, so that the community will have even more information about what is going on in the space sector on national and international level.

## First Space Business Forum webinar:

***Space Business Forum Webinar Series: CASSINI Boosting Space Entrepreneurship in Europe***

**Friday 26 September 2025, 10:00-11:30**

[Agenda](#)

[Registration](#) 

Space Business Forum Webinar #2

Fri 7<sup>th</sup> November at 10 am

"Unlocking ESA Commercialization: Strategic Opportunities for Finland and Beyond."

## Space Business Forum Webinar Series: CASSINI Boosting Space Entrepreneurship in Europe

### AGENDA:

Date and time: Friday 26 September, at 10:00-11:30 (Finnish time)

Place: Microsoft Teams Webinar

#### Welcoming Words

*Tiina Nurmi, Business Finland*

#### Opportunities in CASSINI for Finnish companies & Q&A

*Peter Vaník, Market, Downstream and Innovation Consultant, EU Agency for the Space Programme (EUSPA)*

#### CASSINI-backed VC fund & Q&A

*Filip Kocián, Investor, Expansion Ventures*

#### CASSINI Challenges Idea Winner & Q&A

*Joonas Jokela, Aavuu Oy*

#### CASSINI Hackathon Winner & Q&A

*Katri Rynty, SpaceScope*

#### Ending words & Q&A

*Tiina Nurmi, Business Finland*

*Peter Vaník, Market, Downstream and Innovation Consultant, EU Agency for the Space Programme (EUSPA)*



# Upcoming Horizon Europe opportunity: 4th call

**indicative deadline for submission of applications: February 2026**

Type of Action	Topic	Indicative budget (EUR mln)
IA	HORIZON-EUSPA-2026-SPACE-02-51: Space Data Economy	10
IA	HORIZON-EUSPA-2026-SPACE-02-52: Innovative space-based applications enhancing capabilities for a resilient Europe	5
<b>Total:</b>		<b>15</b>

## 4th call

- European Commission published Horizon Europe [Work Programme 2025](#) (Digital, Industry and Space), including the text of the EUSPA 4th call (HORIZON-EUSPA-2026-SPACE)



*The call is foreseen to be opened on Funding and Tenders portal in October.*



# HORIZON-EUSPA-2026-SPACE-02-51: Developing the European Space Data Economy

**Expected outcome:** support scale up of the space data usage, increasing the wider uptake and mass adoption of the EU space data in selected priority areas that are strategic for Europe.

## Focus Areas

- **Energy:** Enhance renewable energy deployment, energy efficiency, and infrastructure monitoring.
- **Climate & Environment:** Improve climate resilience through better planning and monitoring.
- **Green Finance & Insurance:** Increase transparency and risk assessment in sustainable investments.
- **Liveable Cities:** Enable smarter urban planning, waste management, transport, and sustainability.

## Funding Overview

- **Total Budget:** €10 million
- **Funding per Project:** €1.5–2.5 million
- **Type of Action:** Innovation Action

# HORIZON-EUSPA-2026-SPACE-02-52: Space-Based Solutions for a Resilient Europe

**Expected outcome:** Exploitation of the distinguishing features of Galileo and EGNOS seeking to enhance the way security practitioners prepare for and manage crises and security operations. Proposals should develop applications and technologies that focus on commercial exploitation in the development of EGNSS solutions

## **Focus Areas**

- **Security-Critical Operations:** e.g. maritime and land border surveillance, law enforcement, customs operations, environmental crime.
- **Critical Infrastructure:** e.g. digital infrastructure, water and water waste management, healthcare.
- **Crisis Management:** support coordination centers and first responders with Space-powered solutions (e.g. drones, AR/VR tools, smart wearables)

## **Funding Overview**

- **Total Budget:** €5 million
- **Funding per Project:** €1.5–1.8 million
- **Type of Action:** Innovation Action