SUPPORTING EO COMMERCIALIZATION: Opportunities within the ESA Φ-lab

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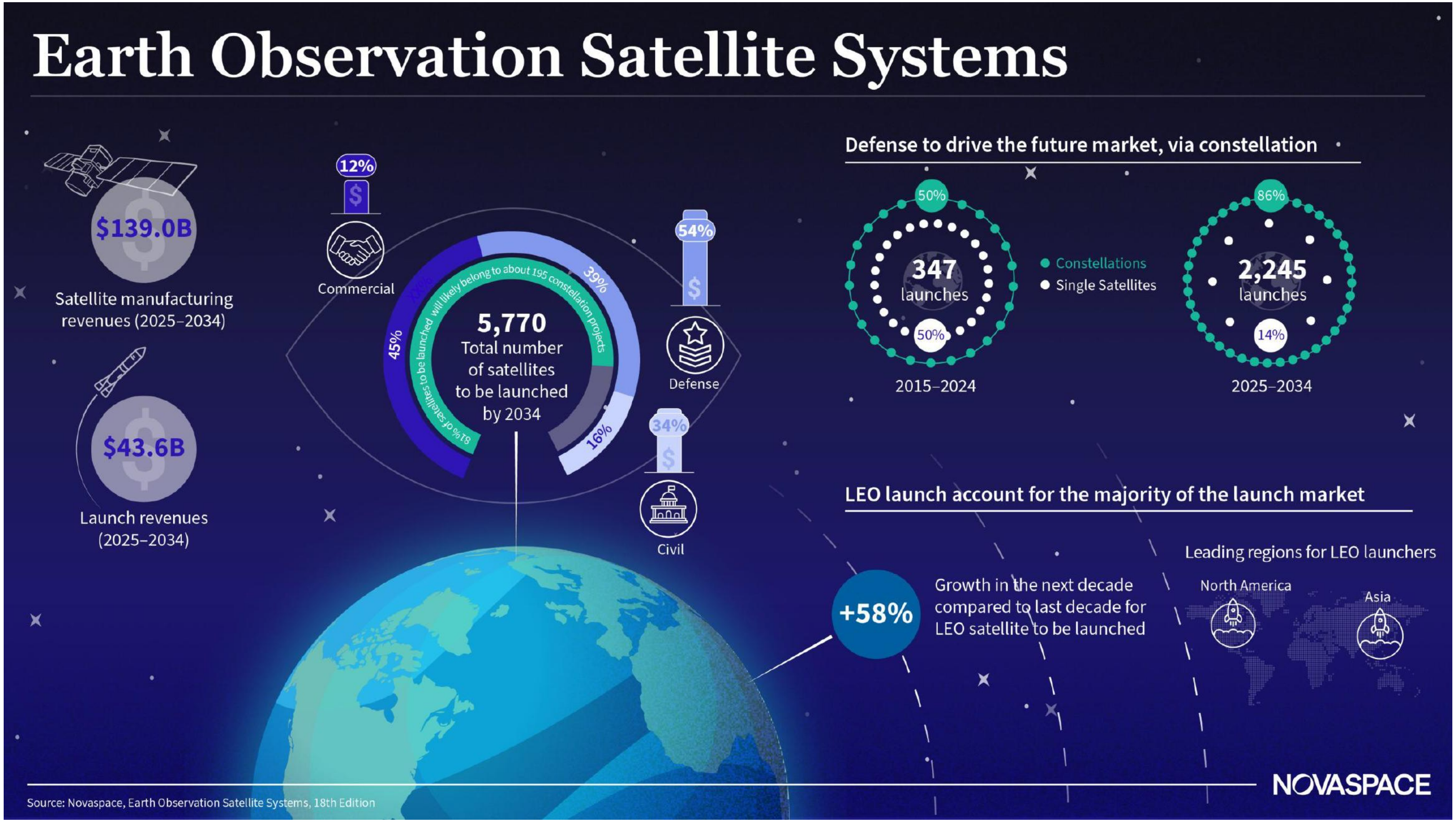
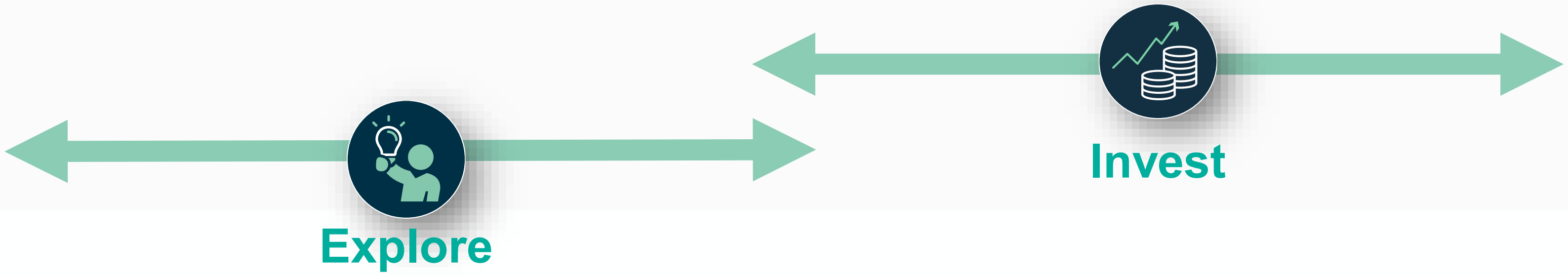
The EO Market



The ESA Φ-lab : Where Disruption Meets EO

Accelerate the future of Earth Observation via **transformational innovation** and **commercialisation** actions strengthening Europe's world-leading **competitiveness**

The ESA Φ-lab : Where Disruption Meets EO



Uniquely at ESA **Φ-lab innovates and applies** under-one-roof

The InCubed Program

What	Industry-led, commercially focused and equity free co-funded programme in Earth Observation 23 countries overall with a total size of 275+ M€
Why	Develop innovative & commercially successful products and services based on strong customer engagement in order to stimulate and grow the EO business across Europe
Who	ESA, National Delegations, and Industry Managed by Φ-lab in ESRIN (Frascati, Italy)
Whom	For **Established companies** (i.e. LSI and SMEs) to innovate their portfolio with highly competitive product/services For **start-ups** and **New Space** companies, to establish their business taking advantage of ESA's strong technical/industrial knowledge and so reducing their business risks
When	Always, it is an open call for proposals with no SoW

Space segment

Platform

Payload

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Space segment

Ground segment

Ground Networks & Data Distribution

Ground Stations & Mission Management

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Data segment

Space segment

Data Analytics, Insights & Applications

Ground segment

Data Processing & Visualization

The InCubed Program: Key Achievements

169 Activities funded: **80 running**, **89 concluded**

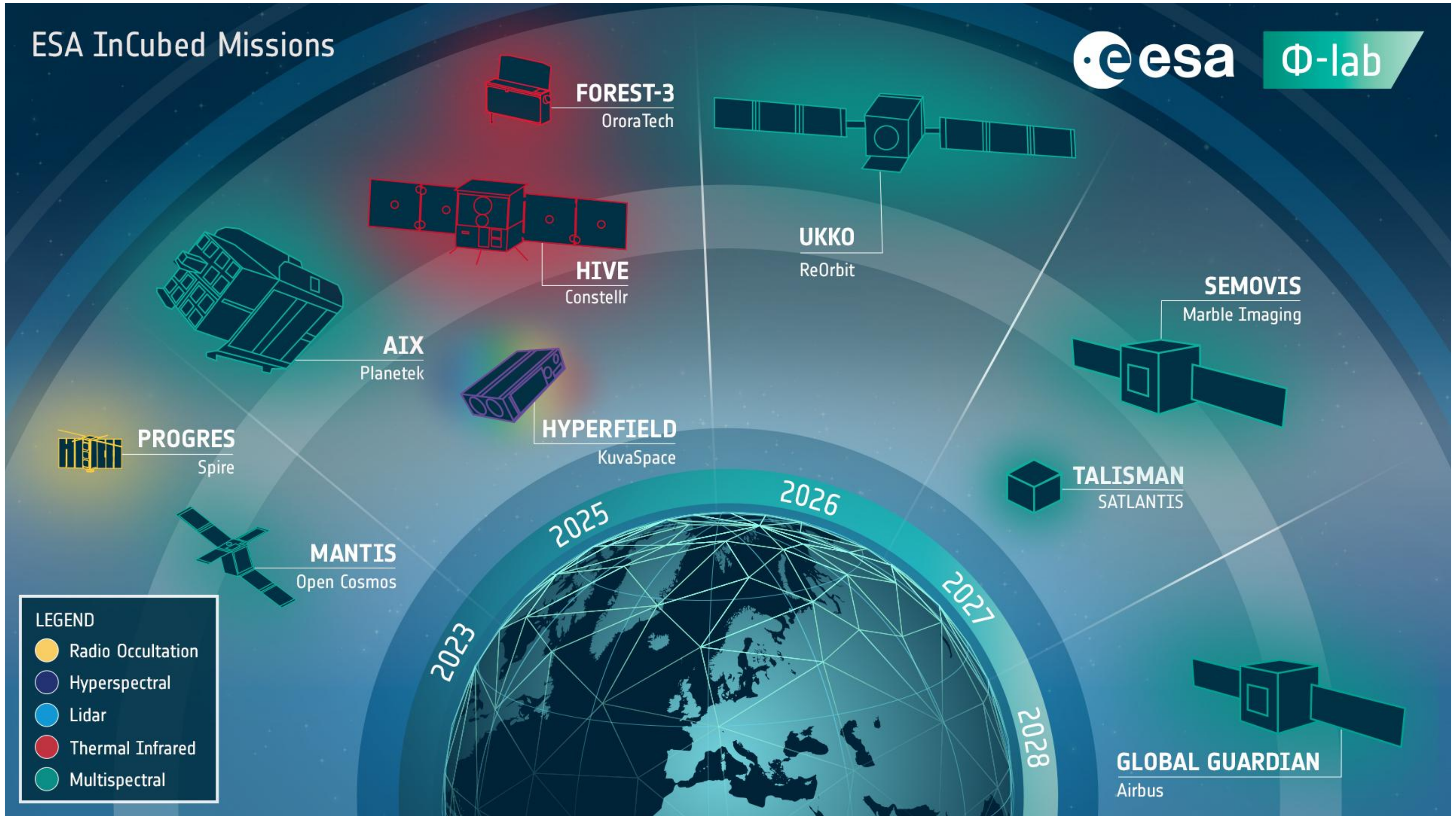
8 Satellites successfully launched

Recognized as a **fast and effective tool** to support commercial actors

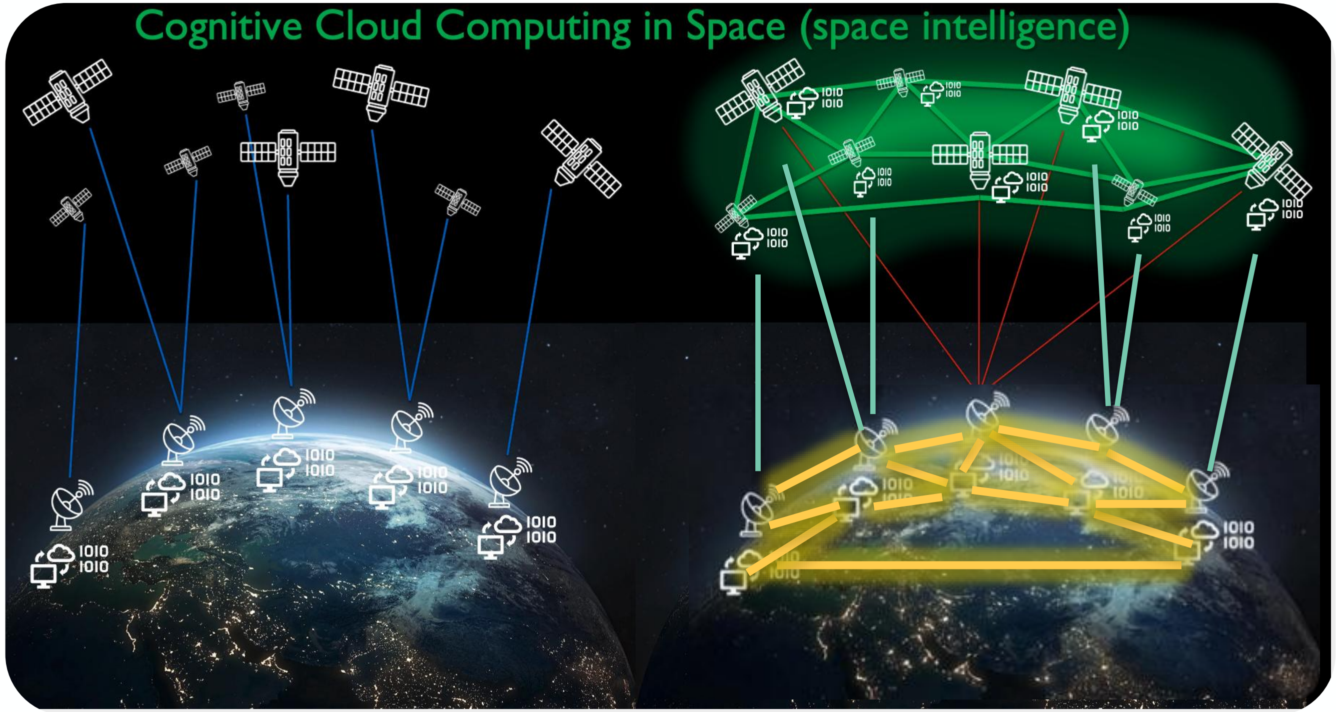
Fully aligned with **national space strategies** (successful national calls, e.g., UK, Spain, Portugal, Norway)

InCubed has triggered significant **VC investments** in New Space start-ups

Company sales and evaluations continue to grow, driven by the program's outcomes and credibility with stakeholders



Cognitive Cloud Computing in Space (3CS)



Why Cognitive Cloud Computing in Space?

- Agility
- Efficiency
- Autonomy
- Reconfigurability

What is Cognitive Cloud Computing in Space (3CS)?

Integrating mature technologies into a cohesive architecture is ongoing.

New 3CS-enabled applications

- Early alert systems (e.g. disaster monitoring, maritime surveillance)
- New observation model (e.g., tip & cue)
- New commercial missions (e.g. space cloud, satellite as services)

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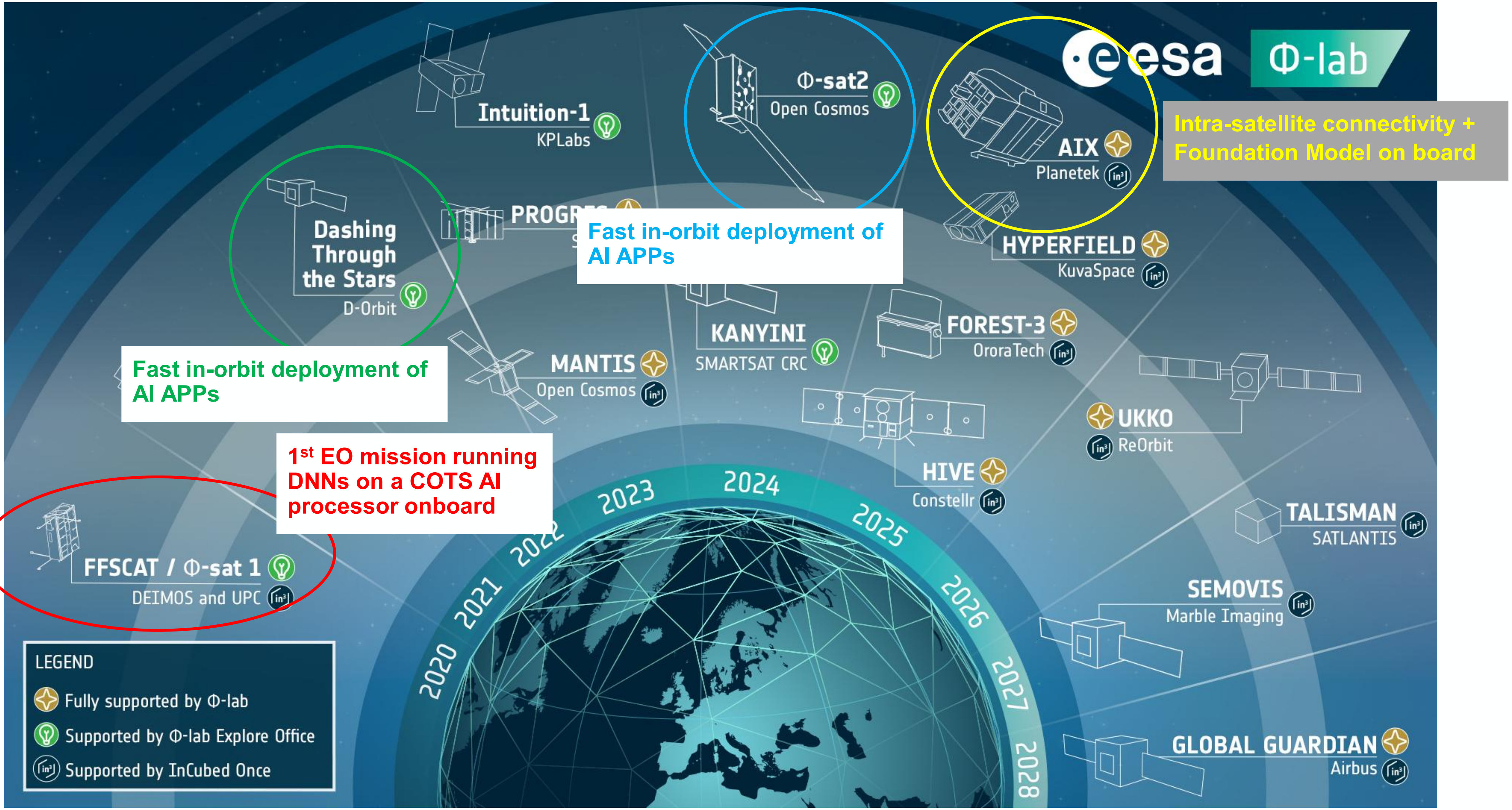
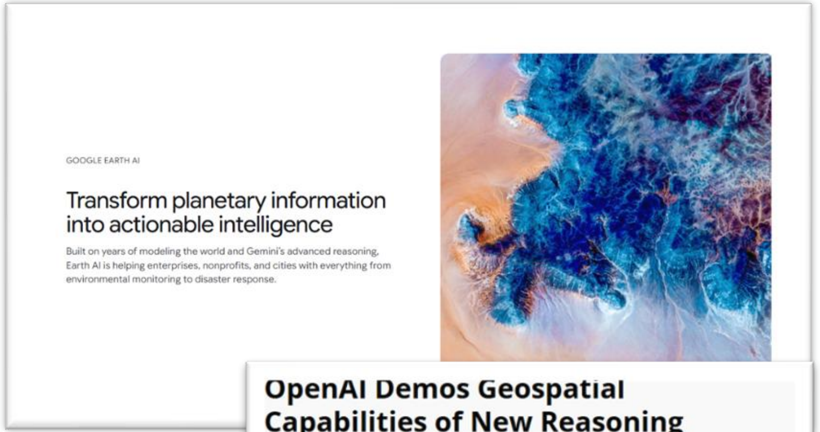


The Earth Agentic Engine

In the US, large technology players are building **geospatial AI-based platforms**:

- massive EO data access
- cloud-scale compute
- foundation Models trained at scale
- AI orchestration and services



A significant share of the underlying data is European-funded EO data (e.g. Copernicus)

"Europe funds the data, others build the AI platforms."

Europe lacks a consistent and coherent integration of AI-enabling capabilities, ranging from foundation models to specialized models orchestrated through reasoning layers to support decision-making

As result:

European data are used to train non-European AI systems

value creation moves outside Europe

Europe risks losing strategic autonomy in Earth AI

ESA can:

- act as **anchor customer**
- drive **public-interest use cases**
- **de-risk** the development

Let’s Stay in Touch!

Are you interested in what we could do for you at ESA?

Write me an e-mail or give me a call!

SCAN ME!

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