



Introduction to ESA's InCubed programme & Business O DO DO HUNHES

SpaceTech Slovenia Austria 2025 27 May 2025 | Ljubljana, Slovenia

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ESA EOP Commercialisation and New Space

ESA EOP as an **ENABLER**

Fully funded by ESA

FutureEO • Block 4 : Enabling downstream applications • Block 3: Enabling commercialisation with GS & data management • Block 1 : Commercialisation with upstream technology

ESA EOP as a **PARTNER**

Co-funded (industry-lead)

InCubed (Earth Watch)



ESA EOP as a **CUSTOMER**

Funded by ESA and/or with a third-party partner

Commercialisation through EO Data Buy for science (TPM) & for operations (CCM)

"Traditional" EOP R&D procurement agency role

Fully funded by ESA " New Space approach"

> Scouts (FutureEO Block 2)

Arctic Weather Satellite (Earth Watch)

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ESA EOP Commercialisation and New Space

ESA EOP as a **PARTNER**

Co-funded (industry-lead)

InCubed (Earth Watch)







ESA contributions in the EO company life-cycle





ScaleUp INVEST

BASS

Data Buy (CCM/TPM)



TURN AROUNDS > **10 M€**

INSTITUTIONAL INVESTORS



GROWTH CAPITAL > **10 M€**

PRIVATE EQUITY/LEVERAGED BUYOUT

Technology Readiness Level



TRL 7/8

Φ-lab run Investing in Industrial Innovation (InCubed)





Personalised technical







InCubed process

Entry Point (Idea Pitch and Proposal Part 1+2)



Guide	TDI	ACDI	Funding Level up (of total allowable		
Cycle	TRL	ASRL	Large Companies		
De-risking	Up to 4-6 ⁽¹⁾	Up to 3	Up to 75%	Up	
Product development	Up to 7 (8 for IOV)	4 Up to 8	Up to 50%	Up	

⁽¹⁾ Depending on the technological or market risks as assessed by the Agency





OUTPUT

Product ready for the market, Validation with users/customers



InCubed Activity segments

Incubed activities can be dedicated to:

Space Segment

Activities related to any on-board product/service



Ground Networks & Data Distributions



Data Processing & Visualisation

Data Segment

Activities related to management, processing and the use of the Earth observation data









Platform

Payload



Ground Stations & Mission Management

Ground Segment

Activities related to the ground segment of an Earth observation satellite system



Data Analytics, Insights & Applications



ESA as a Partner – InCubed – What ESA offers

Risk sharing

Equity and IPR free co-funding

Personalised technical and commercial guidance ESA technical and business development expertise

Strong connection with private investors In coordination with the ESA Directorate of Commercialisation Industry and Competitiveness (D/CIC)















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Fraunhofer

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OPEN COSMOS



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AEROSPACE TECHNOLOGY AND ENERGY SYSTEMS

Spaceit

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Norwegian University of Science and Technology









Supported InCubed Downstream Companies





ESA InCubed Missions



2024

2023







LEGEND



Radio Occultation

Hyperspectral

Lidar

Thermal Infrared

Multispectral

InCubed impacts to the EO commercial industry InCubed, ScaleUp, and CCM synergetic pipeline



Five InCubed companies have been awarded with a CCM contract providing quality data for operational public needs within the Copernicus framework

Two others (Constelling and ReOrbit) have qualified also for ScaleUp Invest step1 for scaling up their service

The success of these InCubed companies is a testament to the value of what small emerging European companies are doing with the support of the different teams at ESA



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SKAISEN Highly reusable AI-based cloud screening for general EO missions	CGI SATSIGHT (EO AUTOMOP) Earth Observation Automated Monitoring Open Platform	ORORATECH'S GLOBAL WILD OroraTech's Global Wildfire Warning SEE →	FLOODSENS FloodSENS: Smart Sensing Floods



: Smart Sensing of

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Eoliann API for Banking Climate Change Physical Risk: global forecast of natural



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InCubed achievements

•12 Satellites/Constellations supported

- •Recognized as a **fast and effective tool** to support commercial actors
- •Fully aligned with national space strategies (successful national calls, e.g., UK, ES)

 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













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The future inCubed programme













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"Developments" Declaration and Implementing Rules esa

Activities are proposed directly by the Economic Operators to ESA. Priority is on the business case

The final outcome of the activity shall be a product hardware, software, techniques, technology, system, or subsystem or service, in the form of a minimum viable product (MVP) and ready for, or demonstrably closer to, commercialization (revenue generation)

LoA is required. Discussion are ongoing on how to streamline the process (CIC interaction)

Development activities will follow two cycles :

- **De-risking Phase**
- **Product Development Phase** 2.

Economic Operators may apply for either or both cycles depending on idea maturity (market and technical). Each cycle offers different levels of co-funding, corresponding to the TRL of the involved cycle. All activities are <u>co-funded</u>.







Partnerships Goals

Objective: Facilitate innovative **large-scale commercial projects** across various areas including EO constellations, satellites, platforms, payloads, ground segments, and value-added services.

Partnerships topics:

- Ideas from economic operators
- ESA Initiate Needs identified by ESA or third parties \rightarrow ESA to identify needs

Typical Motivations:

- Procurement Cost/Time Savings (e.g., SpaceX/COTS, Boeing Starliner)
- **Capability Development** (e.g., LEO Cargo Return Service)
- Market Development (e.g., SpaceX/COTS, Commercial Crew Program)



Ideation via
community consultation and call for ideas

- Cognitive Cloud Computing in Space (**3CS**)
- Science/Climate Related Missions 2)
- More to come \rightarrow Survey in preparation 3) (Industry and Partners)

Over 26 European industrial players have been contacted to date

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"Partnerships" Declaration and Implementing Rules · eesa

A. Industry Initiated : Industrial Proposal Based on Industry Identified Business Opportunities B. **ESA Initiated :** ESA or Third-Party Identified Demands

All partnerships must present a viable business case to ensure their commercial effectiveness.





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80%			Gates to move
nical risk		-	one phase to th
			and within each
80%	$\overline{}$		
nical risk			
n pre-defined SLA KPIs	$\overline{}$		







Trilateral meeting day: InCubed-Industry-Delegation eesa

SpaceTech Slovenian Austrian 2025

B2B Meetings (and during breaks)

20th June: dedicated to Trilateral meetings:

- Discuss ideas
- Ask questions
- InCubed process guidance

Get your slot emailing at: incubed@esa.int



2025 JUNE

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	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SAT
	1	2	3	4	5	6	7
S	8	9	10	11	12	13 NATIONAL DELEGATION	14 IS
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Next event: Living Planet Symposium 2025

With sessions organised by the Φ -lab Invest Office:

- 24-26 June, Vienna
- E.03.01 Commercial Earth Observation Missions: Embracing New Paradigms and Innovative Models
- E05-02 Opportunities in the EO Market : Focus on GHG Monitoring
- Policy-makers-Stakeholders-Industry
- **Registration still open!!**





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→ THE EUROPEAN SPACE AGENCY



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