Industrial Policy in Practice: Connecting ESA, Industry & Opportunity

Industry Space Days (ISD)

16-17 September 2026

Christine Klein

Director of Controlling, Finance & Operational Procurement

EUROPEAN SPACE AGENCY

ISD – A growing platform

Connecting the European space ecosystem

ESA's flagship platform connecting the full European space value chain with ESA's future programmes and business opportunities

2016

2020 *(online)*

2022

2018

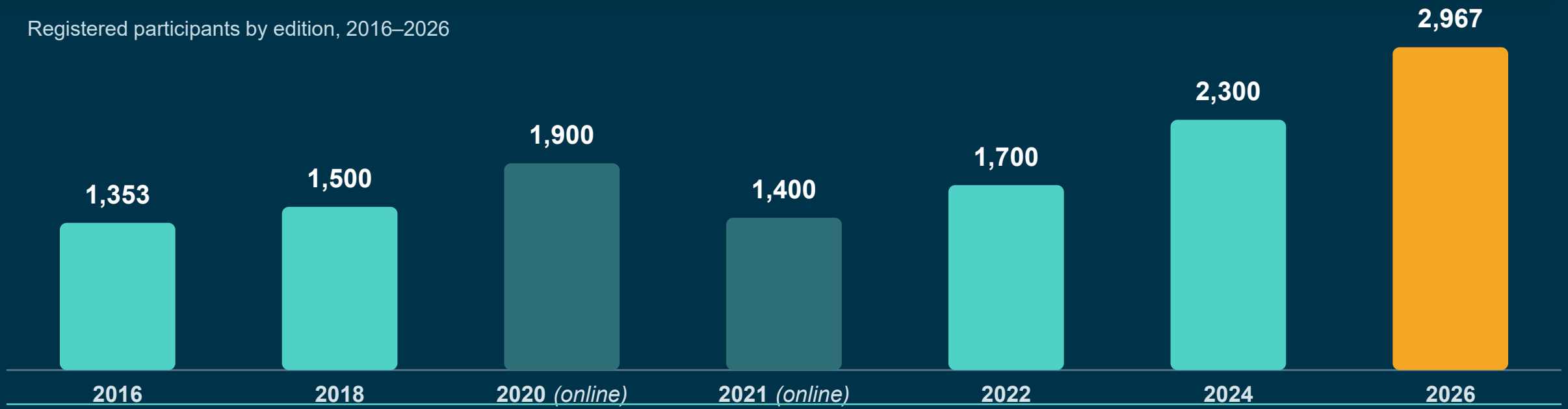
2021 *(online)*

2024

ISD – A growing platform connecting the European space ecosystem

ISD participation has more than doubled since 2016

Registered participants by edition, 2016–2026



2026 at a glance

2,967
PARTICIPANTS
▲ +119% vs 2016

1,500
COMPANIES / ORGANISATIONS
▲ +99% vs 2016

236
EXHIBITORS / BOOTHS
▲ +107% vs 2016

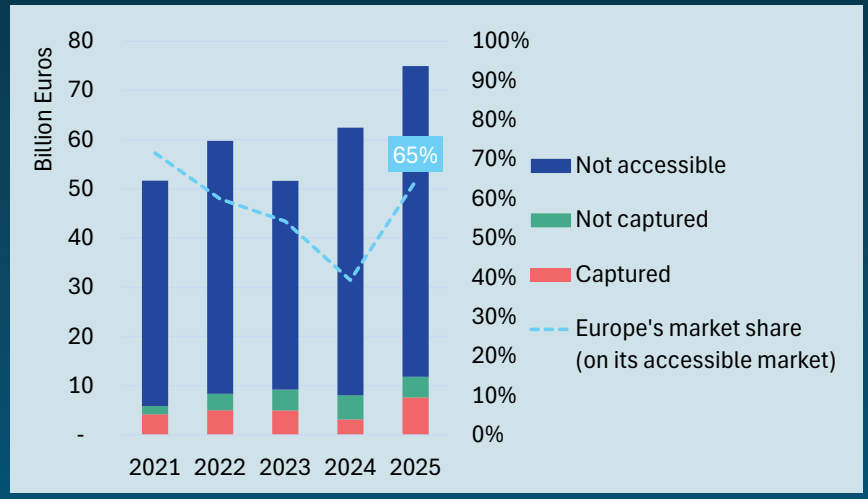
Europe needs a stronger, more competitive space industry

Europe faces **structural competitiveness challenges**:

>80% of the global upstream market value not accessible to European primes

In the past 5 years, European primes benefited from a government demand **5 times lower than in China**, and **4 times lower than in the US**
→ **The European space industry is the most exposed to the global market demand variations**

After 4 years of decline, European primes recovered market share in 2025, capturing **10% of the global market** (6% in 2024) and **65% of their accessible market** (33% in 2024)



Ref. *"ESA Report on the Space Economy 2026)"*

1. Protect our Planet and Climate
2. Explore and Discover
3. Strengthen Autonomy & Resilience
4. **Boost Growth and Competitiveness**
5. Inspire Europe

ESA STRATEGY 2040 — GOAL 4 OF 5

Boost European Growth and Competitiveness

ESA Industrial Policy: balancing four fundamental objectives

ESA's industrial policy is defined in **its Convention** and is **at the heart of the Agency's functioning**

Exploit the advantages of free **competitive bidding**

Improve the **world-wide competitiveness** of European industry

Ensure **equitable participation** among Member States, having regard to their financial contribution (Geographical Return)

Meet the requirements of space programmes in a **cost-effective** manner

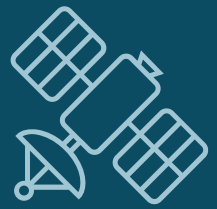
About 85% of ESA's budget is spent on contracts with European industry

A Partnership between ESA and Industry

What industry needs from ESA — and what ESA needs from industry

Industry needs from ESA

- Visibility & predictability
- Fair & accessible opportunities
- Simpler processes
- Faster decisions
- Shorter time-to-contract
- Consistent engagement



MISSION SUCCESS

+

EUROPEAN COMPETITIVENESS

ESA needs from Industry

- Competitive offers & value for money
- Innovation and speed
- Reliable delivery
- Resilient European capabilities and supply chains
- Partnership and transparency

ONE SHARED AMBITION

New CFO Directorate

Organising ourselves for end-to-end delivery and industry engagement

Enabling ESA's future missions by bringing together **controlling, finance, contracts and industrial policy** to provide **more integrated, efficient and consistent support** across the Agency

This translates into…

Controlling, Finance & Operational Procurement

Controlling Hub

Programme insight, planning, reporting and operational support.

Finance

Financial planning, budgeting, accounting, and payments.

Procurement

Procurement strategy, tendering, contracting, contract management support.

Industrial Policy

Industrial return, auditing, geo-return monitoring and related Member State / industry considerations.

More coordinated support for ESA programmes and engagement with industry

Industrial Policy across the full programme lifecycle

Supporting the **full Programme lifecycle** through coordinated expertise

Integrated CFO support
Finance · Controlling · Procurement · Industrial Policy

Choices made at every stage shape industrial opportunity and programme outcomes

What this means for industry

SIMPLER PROCESSES

Clearer requirements and more harmonised procedures, reducing unnecessary administrative complexity.

BETTER COORDINATION

Closer alignment between programme needs, procurement and finance, supporting contract delivery and timely payments.

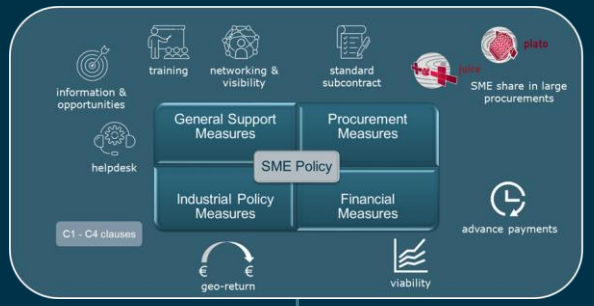
GREATER VISIBILITY & PREDICTABILITY

Greater visibility on future opportunities and planning horizons, enabling industry to plan, invest and mobilise with confidence.

MORE CONSISTENT ENGANGEMENT

More consistent ways of working with ESA, supported by coordinated procurement, finance, controlling and industrial policy expertise.

Industrial Policy in practice: a toolbox, not a single instrument



SME Office

Trainings
Networking & Visibility
Analysis of SME landscape
Industrial Policy and Procurement measures

Industrial Audit Services Office

Audits
Advice (TEB, PARI..)
Financial Performance
Regulatory & Working practices

Industrial Policy and Auditing

Industrial Return & Analytics Office

Monitoring, forecasting and reporting on evolving geo-return, Identifying risks and trends

Industrial Policy & Space Economy Division

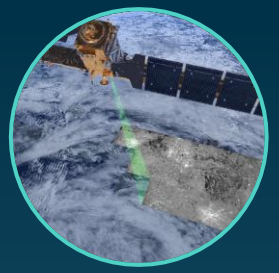
Observatory of Country Capabilities
Supplier evaluation
Socio-economic impact and competitiveness

Capability & Country Support Division

Capability-building programmes
Implementing activities through PECS and RPA

ESA Procurement

Procurement actions for **all main programmes approved at CM25** (or under EU Delegation) have been initiated and are expected to be contracted in **2026-Q4** or **2027**

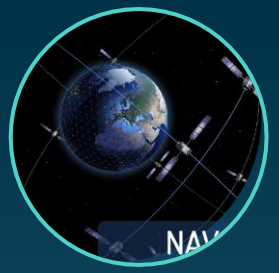


EOP

- Sentinels NG (S3NG,S2NG)
- ERS-EO-IOD
- Aeolus-2
- NGGM
- …

HRE

- Argonaut mission integration & Payloads
- Alladin
- EPIC
- ESM 7-8
- Magpie, …



RNC

- Opstar
- Novamoon
- Celeste
- Hydron-3
- …

SCI

- Arrakihs
- Lisa CMD
- Lisa Telescope
- Optical Bench
- Envision SAR
- Plasma
- Observatory (M7), …

STS

- SEATS
- AR6/Vega various
- LEAP
- CSG
- Astris
- …

CIP

- European Launcher Challenge
- ELEOSYS,
- SELYCE PPPs
- ACCESS…

Technology Development Programmes (e.g. *ARTES, NAVISP, CTP, BOOST, COSMIC , FLPP, GSTP, TDE…etc*)

Many Opportunities for Supply Chain

Enabled by integrated Planning and Controlling

ESA Procurement

200+

COOPERATIVE AGREEMENTS

Following introduction of the new Contracting Regulations, the **“Cooperative Agreement”** has been rolled out across all relevant programmes.

Calls for Proposals currently available:

- **NAVISP Element 2**
- **S2P Cosmic**
- **Incubed**
- **ARTES Technology and Product Development**
- **ACCESS (6 different calls)**
- **GSTP-1** *(GSTP-2 will come soon)*

Scan to explore

All details available in the esa-star Publication

esastar-publication.sso.esa.int

Finance & Controlling — Enabling Effective Delivery

Speed, scale and predictability of Programme execution

FINANCE: Speed & Scale

15 DAYS

AVERAGE TIME-TO-PAY

↓ *from 16 days in 2024*

Faster processing means earlier cash flow for industry

€ 6.5 BILLION

PAID TO INDUSTRY IN 2025

Cash disbursed to Industry through ESA programmes

CONTROLLING: Predictability

Integrated Planning

Linking programme ambitions, budgets and resources

Early Visibility

Monitoring execution, forecasts and emerging deviations

Timely management action

Supporting decisions to keep programmes on track

Faster payments • Better visibility • More predictable delivery for industry

Connecting entities to ESA opportunities

Explore opportunities and support for working with ESA

Scan to explore

PRIMARY GATEWAY

Doing Business with ESA

Your single gateway to ESA's corporate applications, opportunities and services for industry — including esa-star and more.

doing-business.sso.esa.int

SME Office

Dedicated support for small and medium-sized enterprises engaging with ESA.

Explore ESA's SME support

Industrial Policy in Practice: Competitiveness is built together

esa
EUROPEAN SPACE AGENCY

Industry

Clear, fair & efficient routes from programmes to opportunities

Innovation, competitive solutions & reliable delivery

TOGETHER

Turning European investment into

MISSIONS • CAPABILITIES • GROWTH • RESILIENCE

ISD is where many of those connections start

EUROPEAN SPACE AGENCY

THANK YOU!