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Directorate of Commercialisation and Industry Partnership

ISD2026, ESTEC, 16-17 September 2026

Geraldine Naja
Acting Director of Commercialisation and Industry Partnership

16 September 2026

EUROPEAN SPACE AGENCY

Director Personal Introduction

- Took up role of Director of Space Transportation (D/STS) based at ESA Headquarters in Paris on 1 April 2026
- 30-year experience in the European space sector in managerial and strategy development positions:
  - Joined ESA in 1987 as a Payload Operations Engineer in the Space Station Directorate
  - Various corporate and programmatic functions across the Agency between 1993 and 2015
  - Previously led the Directorate of Commercialisation, Industry and Competitiveness (D/CIC), now evolved into the Directorate of Commercialisation and Industry Partnership (D/CIP, currently as acting Director)

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Directorate of Commercialisation and Industry Partnership (CIP) aims to maximise the commercial return in the space sector for European companies

The new Directorate responds to the evolving commercial landscape relating to the space ecosystem

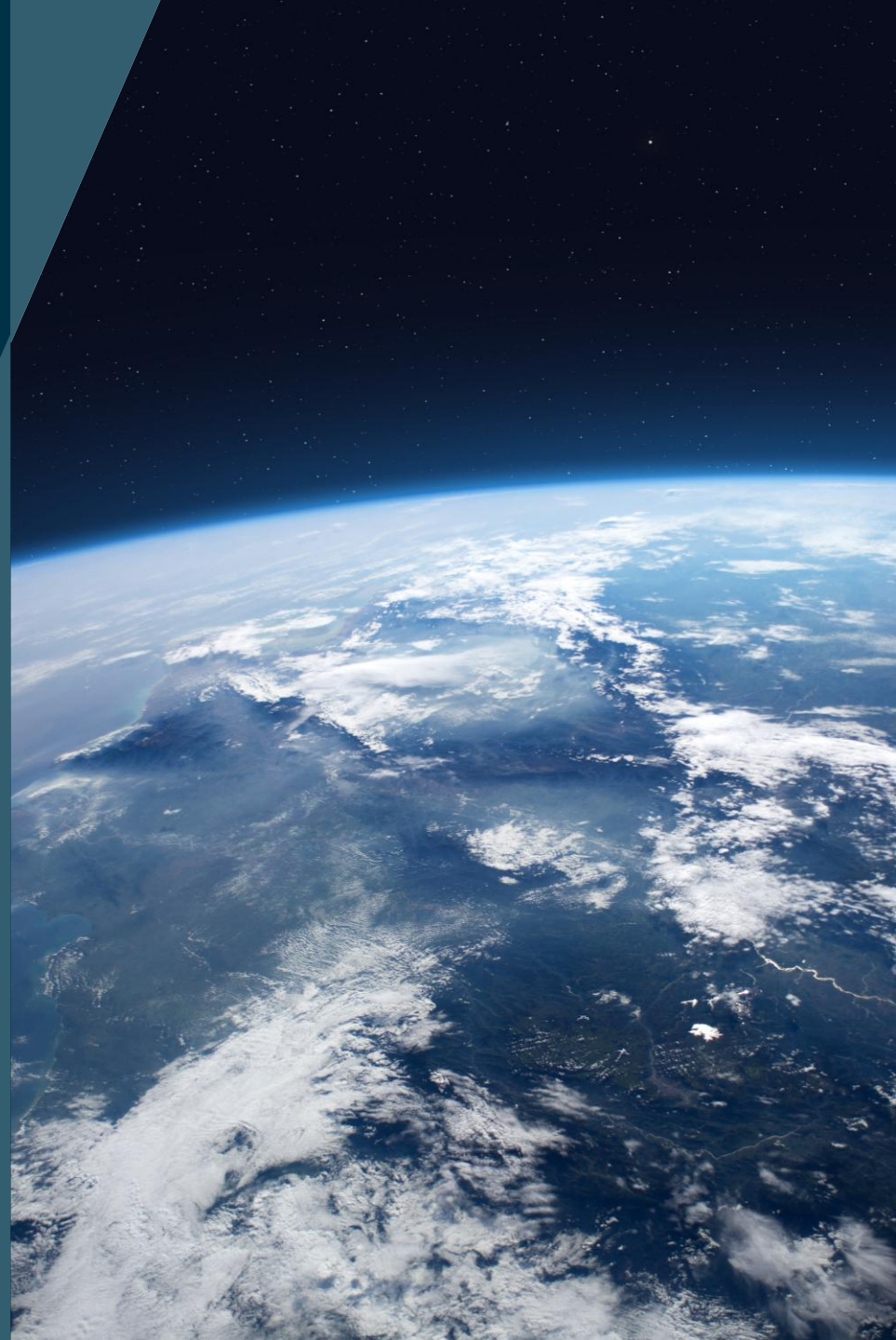
ACCESS: Accelerating Commercialisation and Competitiveness of the European Space Sector

The key focus areas of the ACCESS programme are:

- Supporting the **growth and competitiveness of** European companies in the global space economy
- Facilitating the **development and market entry** of space-enabled products and services

The goal: expand the footprint of space in Europe

ELEVATING THE FUTURE OF EUROPE



ACCESS: ScaleUp Highlights

ESA BICs span **23** countries

Since 2004, BICS have supported **2,200** start-ups

ESA Phi-Labs now operational in **10** countries

So far in 2026, **18** Technology Broker projects have concluded with commercial agreements

ScaleUp Commercialisation Network Meeting, Seville, May 2026

CASE STUDY: 15 YEARS OF ESA BIC UK

Since 2011:

179 young companies have been inducted

95% have succeeded to grow over the years, attracting investment and creating jobs

£13 million invested by ESA at that critical and uncertain early stage

These companies have contributed **£486** million to the UK economy

These companies include Open Cosmos, Adaptix Ltd, Geocento, Archangel Autonomy, Lacuna Space, SATAVIA, Orbital, Deep Planet, Lumi Space, LMO, Magdrive, SmartIR...

ACCESS: Business Applications and Space Solutions (BASS) Highlights

Impact

>1100
Jobs created and maintained

>64%
Revenues on export markets

>1100
Partnerships established

Data taken from 200 projects in 2022-2025

Collaboration

6 Task Forces created

- Energy
- Smart Cities
- Maritime
- Bioeconomy
- Logistics and Infrastructure
- Finance and Insurance

2022–2026 there have been >30 collaborations

Corporate, private and public sector partners across multiple sectors including:

transport, mobility, energy, agriculture, construction, sports, critical infrastructure, environment, maritime and retail

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The ESA Investor Network

The Investor Network connects investors and financial institutions to companies and ESA programmes to facilitates access to finance.

Founded in 2022

100+ investors in the network

150+ companies supported

ELEVATING THE FUTURE OF EUROPE

Implementing disruptive connectivity products and systems

The ARTES programme works with industry and operators to develop and implement connectivity solutions through:

- **Commercially relevant SatCom products and systems** including 5G/6G Non-Terrestrial Networks (NTN)
- **Commercial partnerships**
- **Industrialisation** activities enabling acceleration of industrial transformation

Delivering impactful partnerships with industry

More than 15 years successfully implementing Partnership Projects with most European Operators & Satellite Primes

€4bn+ Sales Revenue generated by 2024 and about €8bn forecast by 2029, from participation in ARTES Partnership Projects

More than 15 years successfully implementing Partnership Projects with most European Operators & Satellite Primes

Partnership Projects Highlights

- Federate Industry around large-scale programmes achieving competitive leap forward and economical impacts.
- De-risk partners investments answering to market needs
- Develop sustainable end-to-end systems up to in-orbit validation
- Trusted partner for investors, operators and industry
- Efficient co-management approach tailored to commercial best practices, maximizing benefits to Industry

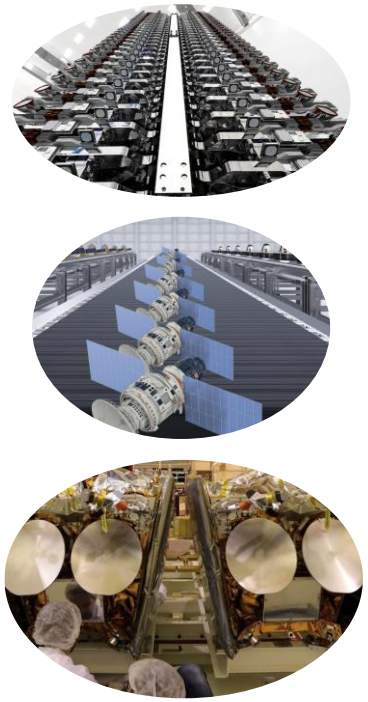
One motto : **Your Partner in Orbit**

Commercial Connectivity Activities

Commercial Connectivity Services & Platforms Partnerships

Commercial Technologies, Products, Systems and Future Partnerships

Commercial Constellations and Next-Gen 5G/6G NTN Partnerships



Industrialisation of Commercial Technologies, Products and Systems

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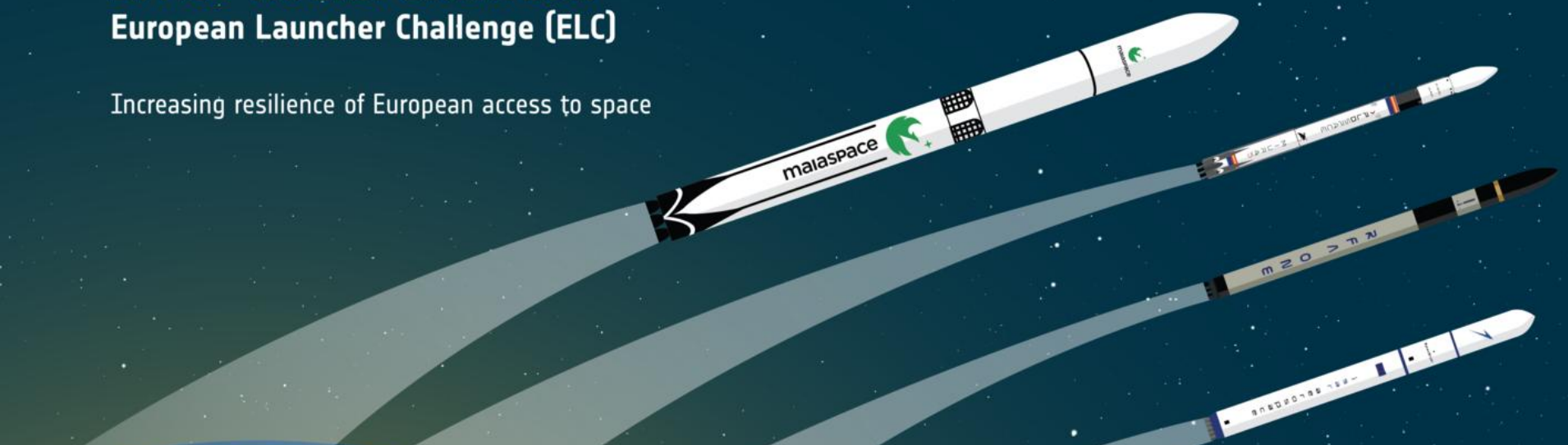
SPACE TRANSPORTATION

European Launcher Challenge (ELC)

Increasing resilience of European access to space



First stage invitation to tender

March

May

July

ESA Council at Ministerial Level

November

Proposal submission

Evaluation

Preparation of CM25 proposal

2025

Dialogue phase with industry and potential participating states

June

October

2026
Second stage invitation to tender

2027
Latest first launch

2028
Latest upgraded capacity

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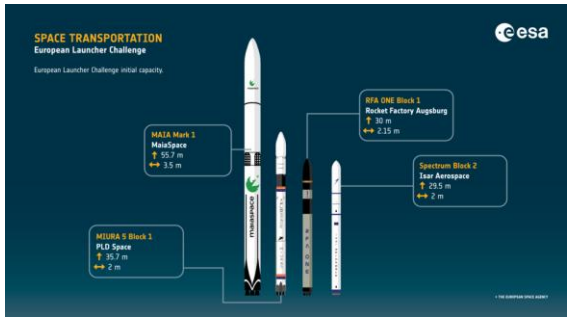
European Launcher Challenge Status



ENABLING & SUPPORT

First contracts kick off European Launcher Challenge

27/08/2026 5871 VIEWS 28 LIKES

ESA / Enabling & Support / Space Transportation

In brief

- The first contracts for the European Launcher Challenge programme have been signed.
- The European Space Agency's initiative expands launch service supply and ensures greater robustness in Europe's access to space.
- Following a comprehensive evaluation of each proposal, the contracts kick off the implementation of the European Launcher Challenge, giving companies access to ESA support for the deployment and improvement of new launch services.

Three contracts signed as per end of August 2026:

- **Isar Aerospace:** €197.8M mainly funded by Germany with contributions by Austria and Norway.
- **PLD Space:** €158.9M mainly funded by Spain with a contribution by Germany.
- **RFA:** €186.9M mainly funded by Germany with a contribution by the UK.
- **MaiaSpace:** contract nearing completion.

See https://www.esa.int/Enabling_Support/Space_Transportation/First_contracts_kick_off_European_Launcher_Challenge

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SPACE TRANSPORTATION

European Launcher Challenge

European Launcher Challenge initial capacity.

MAIA Mark 1
MaiaSpace
↑ 55.7 m
↔ 3.5 m

RFA ONE Block 1
Rocket Factory Augsburg
↑ 30 m
↔ 2.15 m

Spectrum Block 2
Isar Aerospace
↑ 29.5 m
↔ 2 m

MIURA 5 Block 1
PLD Space
↑ 35.7 m
↔ 2 m

Just qualified through a Boost! launch

Boost!

ESA's Commercial Space Transportation Services and Support Programme

Commercial Space Transportation Services

DAWN AEROSPACE
SpaceForest
D-ORBIT
RFA Rocket Factory
HyImpulse
Andøya Space
SPACE FORGE
PLDSPACE
isar aerospace
SKYRORA

Credit: Isar Aerospace

Flight Ticket Initiative

Selected IOD/IOV Missions

SPACEMANIC
ALI
GRASP
DLR
SpaceLocker
ENDUROSAT
TECHNISCHE UNIVERSITÄT DARMSTADT
deimos
INFINITE ORBITS
PERSEI Space
AVS added value solutions
ISISPACE 20 YEARS IN SPACE
KU LEUVEN
nano avionics A KONGSBERG COMPANY
Universität Stuttgart
Université Paris Cité
ATMOS

More details in dedicated Boost! session

Today in Conference Hall B at 17:00

ESA's Boost! Programme - Success Stories and Opportunities

- Presentation of programme and opportunities
- Panel with first-hand experience by Boost! supported companies:

SPACE FORGE

ATMOS

DAWN AEROSPACE

isar aerospace

PLDSPACE

D-ORBIT

Credit: Isar Aerospace

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THANK YOU!