Global Affairs Canada
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esa

Challenges and Opportunities for International Collaboration with Canada

September 16, 2026

Agence spatiale canadienne
Canadian Space Agency

Canada

CSA Overview

Established in 1989, the CSA is an agency of the Canadian Federal Government.
Its President reports to the Minister of Industry and Minister responsible for Canada Economic Development for Quebec Regions

MANDATE

- To promote the peaceful use and development of space
- To advance the knowledge of space through science
- To ensure that space science and technology provide socio-economic benefits for Canadians

KEY FUNCTIONS

- Coordinate Government of Canada space policies and programs
- Oversee programs & projects relating to scientific/industrial space R&D and application of space technology
- Promote the transfer and diffusion of space technology to and throughout Canadian industry
- Encourage the commercial exploitation of space
- Cooperate with other countries in the peaceful use and development of space

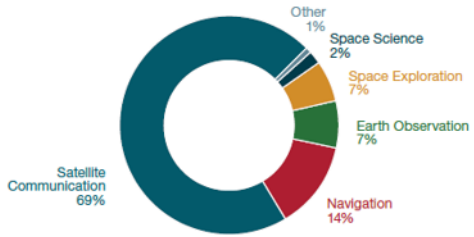
LOCATIONS

- HQ located in Saint-Hubert, QC (Greater Montreal Area)
- Policy & Strategic Partnership teams located in Ottawa, ON
- Three fully trained astronauts and CSA mission specialists located in Houston
- Representatives in Paris and Washington

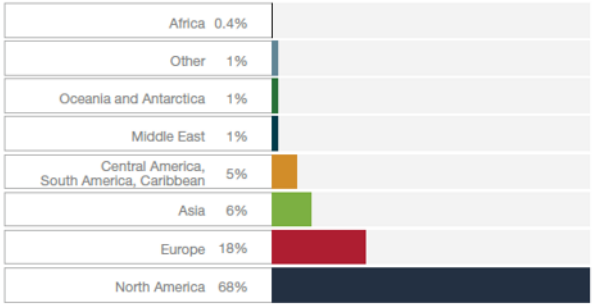
State of the Canadian Space Sector Report 2025

REVENUES

In 2024, the space sector generated $5.0B in revenues, which were broken down into the following sectors:



Of the revenues, 57% ($2.9B) were from domestic sources, while 43% ($2.2B) were from exports. Destinations included:



CONTRIBUTION TO GDP

The sector contributed **$3.8B** to Canada's GDP (value of all final goods and services produced by the space sector within Canada).

INNOVATION

The sector is highly innovative.

Business Expenditures on Research and Development (BERD) totalled **$962M.**

There were **413** inventions and **113** patents.

The R&D intensity for space manufacturing was **17 times** higher than the average for manufacturing in Canada.

RETURN ON INVESTMENT

Investments in space generate commercial impact.

Five years after a project is complete, CSA space development programs averaged an ROI of **3.30x.**

This means that for every $1.00 invested, companies have generated **$3.30** in additional follow-on revenue.

WORKFORCE

In 2024, the space sector supported 28,171 jobs:

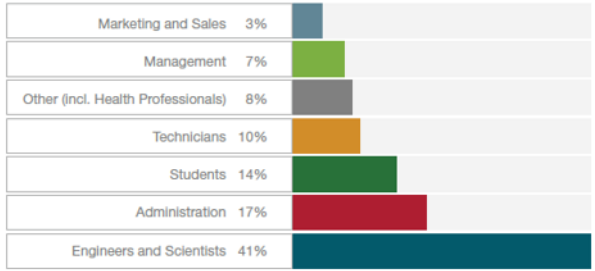
14,622 direct space sector jobs

72% were STEM jobs (science, technology, engineering and mathematics)

74% were filled by HQP (employees with a bachelor's degree or higher)

13,549 Indirect and Induced jobs supported in the greater economy

Key occupations include:



The space sector gender breakdown:

30% women

70% men

0.3% non-binary

The Canadian Space Sector (2025 data)

- **Contributes $3.8B to Canada's GDP**
- **R&D-intensive and active across space value chain/sectors**
  - Leads space commercialization activities (R&D spending 17x higher than manufacturing average)
  - Downstream market > Upstream
- **Composed of >200 organizations**
  - Includes firms, universities, and research centres spanning the country
  - 66% of Canadian space companies are SMEs, represent 18% of revenues
- **A growing, highly skilled workforce**
  - Supports >28,000 jobs in Canada; a clear majority of direct space sector jobs are HQP (74%) and STEM (72%)
- **Export-focussed**
  - 43% of sector revenues derived from abroad

Canadian industry participating to the ISD 2026

Note: Based on data from the *State of the Canadian Space Sector Report (2025)*

Building Strategic Partnerships with Europe

Canada's Space Value Proposition

- **A trusted and strategic partner**, with more than 47 years of successful cooperation with ESA and a strong track record of delivering on international commitments.
- **World-leading expertise in high-value space technologies**, including robotics, Earth observation, artificial intelligence, quantum technologies, satellite communications, autonomous systems, and more.
- **A dynamic and export-driven space ecosystem**, home to globally recognized companies such as *MDA Space, GHGSat, Telesat, Kepler Communications, Calian and Magellan Aerospace* (and many more), supported by world-class universities and research centres.
- **A natural partner for Europe**, with shared priorities in space exploration, climate action, security, resilience, commercialization, and the development of next-generation space capabilities.

Canada combines innovation, reliability, and globally competitive industrial capabilities, making it a partner of choice for international space collaboration.

Canada and ESA Cooperation

A Unique International Partnership

- Since 1979, Canada remains ESA's only non-European Cooperating State. It is one of the most successful and unique international cooperation models in the space sector.

Canada makes strategic investments in ESA optional programmes: funding from Canada provides opportunities for Canada's space sector to obtain contracts and participate in ESA missions and projects.

Benefits for Canadian Companies

- **Access to ESA programs and European markets**, providing Canadian companies with procurement opportunities, international visibility, and pathways to expand their business across Europe.
- **Technology development and validation**, enabling firms to mature innovative solutions, reduce development risks, and accelerate commercialization of space technologies.
- **Strategic partnerships with leading European industry and research organizations**, fostering knowledge transfer, technical expertise, and integration into international space value chains, often leading to follow-on sales.
- **Enhanced competitiveness and growth**, strengthening export potential, building highly qualified talent, generating valuable flight heritage and references, and positioning Canadian companies for long-term success in global space markets.

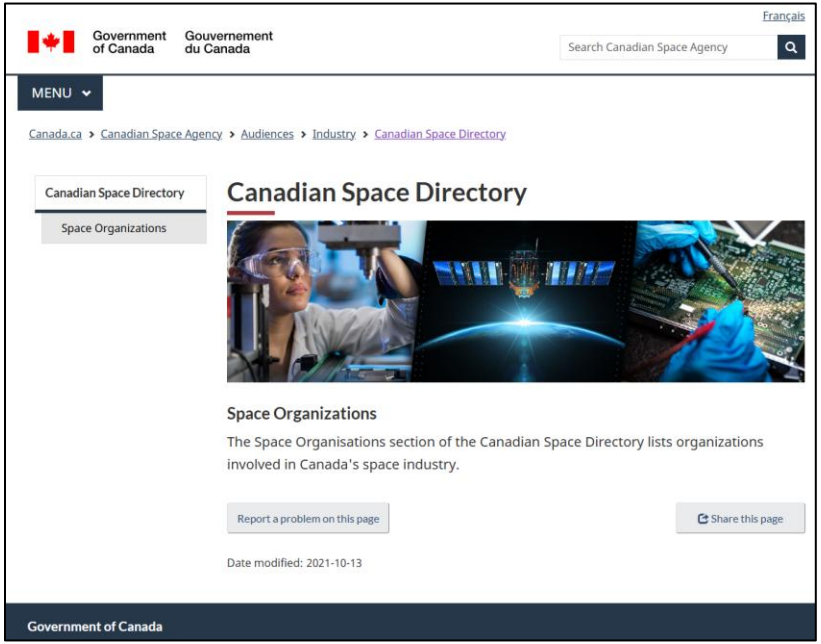
Canada's Investments in the ESA Program

- At the last ESA Ministerial Council Meeting (CM25) Canada announced a historic investment of approximately **$664.6M CAD (407.71M EUR)** for ESA's Optional Programs.
- Canada's contributions to ESA increased by over 400% (compare to CM22) to help to build industrial capacity in dual-use space technology areas.
- Canada also subscribed to new programs:
  - Moonlight: Cislunar communications and navigation services infrastructure.
  - FutureNAV: In-orbit demonstrations for positioning, navigation, and timing (PNT) technologies.
  - ACCESS: Accelerating Commercialisation and Competitiveness of the European Space Sector for Canadian startups and established players.
  - ERS-EO: European Resilience from Space for Earth Observation, addressing crisis management and dual-use space sensing

Canada's contributions to ESA directly support trade diversification with Europe, aligned with Government of Canada priorities

Program Areas Canada Invested in at CM25	
Earth Observation	$189.9M - €116.5M
Satellite Communications	$131.2M – €80.5M
Exploration	$122.3M - €75M
Navigation	$9M – €5.5M
Technology	$73.4M - €45M
Space Safety	$48.9M - €30M

More information on Canadian Space Capabilities



Online Canadian Space Directory

https://www4.asc-csa.gc.ca/RSC-CSD/eng

Canadian ISD Participants Booklet

(available on demand)

Collaborating with Canada

- Increasingly **uncertain global environment**, Canada is pursuing a strategy of trade diversification and economic resilience.
- The **EU is a natural partner** in that effort given our longstanding commercial relationship, shared values and complementary strengths.
- Canada combines political stability, a predictable regulatory environment, world-class research and talent, abundant natural resources and preferential access to major global markets through an extensive network of trade agreements.
- Trusted and resilient supply-chain considerations are increasingly important.
- Canadian companies bring specialized capabilities that complement Europe's industrial base. Canada excels in high-value, specialized technologies and subsystems.
- Canada already provides preferential access to approximately 1.5 billion consumers and is working to expand that reach further.

Collaborating with Canada – the Trade Commissioner Service

OUR NETWORK

We are your global team on the ground. An unbeatable network with offices across Canada and around the world.

125+ YEARS SUPPORTING CANADIAN SMEs

10,000+ CLIENTS EACH YEAR

1,000+ TRADE COMMISSIONERS

160+ LOCATIONS WORLDWIDE

6 OFFICES IN CANADA

Canada: Challenges to International (European) Consortium Building

1) Navigating the European ecosystem

- ESA is a principal actor in a complex European landscape.
- In addition to ESA's own programmes, Europe has many layers of national agencies, funding instruments, primes, regional ecosystems and EU programmes, some of which are also implemented by ESA. E.g. EUMETSAT.
- For newcomers and non-European entities, it may not be clear where opportunities are published, who holds the budget, or which programmes are accessible to whom.

2) Finding partners and entering supply chains

- Canadian capabilities are not always visible to potential European partners.
- Companies need to know who is building consortia and where they can add value.
- Canada's aim for sustainable supply-chain integration beyond buying or selling products will also offer opportunities in higher levels of the value chain.

3) Distance, presence and standards

- Distance and limited European presence make regular engagement more difficult.
- European networks often rely on frequent interaction and established relationships.
- NASA, military and North American standards may differ from ECSS requirements.
- Adaptation can require additional cost, time and organisational effort for Canadian firms.

Visibility, relationships and early alignment are essential for entering this industrial ecosystem

Common Pitfalls when European Companies Engage with Canada

1) Not verifying eligibility of CA companies in advance

- Capability & interest do not automatically mean eligibility.
- Participation varies by programme, funding availability and strategic considerations that may go beyond ESA.

2) Engaging only after an opportunity has been published

- Approaching Canadian companies only after the consortium and workshare are fixed.
- Avoid making assumptions about
  - funding and eligibility.
  - standards and qualification.
  - intellectual property.
  - responsibilities and commercial expectations.
- Build the relationship first and identify suitable opportunities together.

3) Viewing the relationship as transactional

- Canadian companies are technological peers to their European counterparts and seek long term partnerships.
- Consider technology, market access, facilities, customers and supply-chain value.
- Create a partnership that remains valuable beyond a single ESA procurement.
- European companies should return Canadian interest by also exploring Canadian programmes, customers and industrial opportunities.

Check early. Engage early. Build for the long term

Questions ?

Contacts / Personnes ressources

Canadian Space Agency / Agence spatiale canadienne

Steve Iris (Manager, Canada-ESA Program)

Martin Anderson (Manager, Industry Relations)

Global Affairs Canada / Affaires mondiales Canada

Monica Ambelez Karrer (Trade Commissioner - Science, Technology and Innovation · Embassy of Canada to the Netherlands

European Space Agency / Agence spatiale européenne

Cornelius Zünd (Industrial Policy Officer and Canada's Country Desk Officer)

ESA_programme-ESA_program@asc-csa.gc.ca

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