



United Nations
Office for Outer Space Affairs

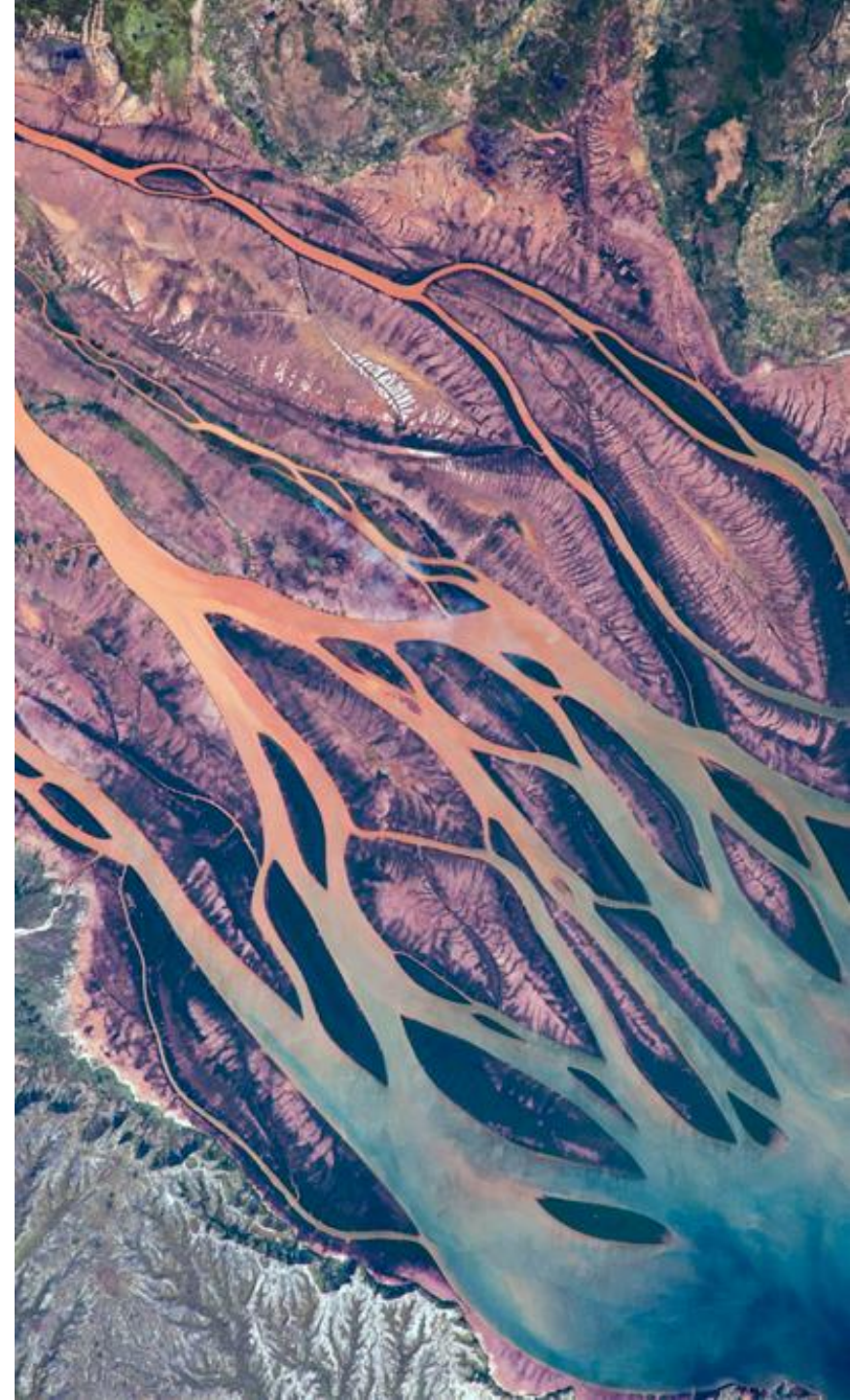
SPACE ECONOMY OPPORTUNITIES

Setting the scene for the workshop

From access to value, capability and sustainable national ecosystems

33rd UN/IAF Workshop
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The workshop journey: from opportunity to outcomes



How can countries turn space access into national value, capability and sustainable ecosystems?



A growing space economy — and a growing development opportunity

Space economy growth matters because most value is now linked to services, data and applications.

\$626B

Global space economy
in 2025

\$236B

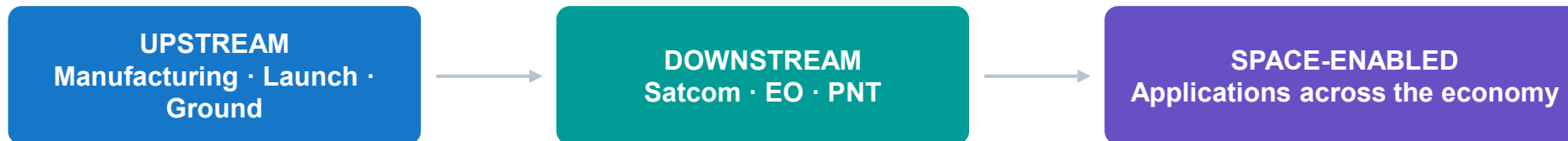
Core space market

\$329B

Space-enabled
applications

\$1.01T

forecast global
space economy by
2034

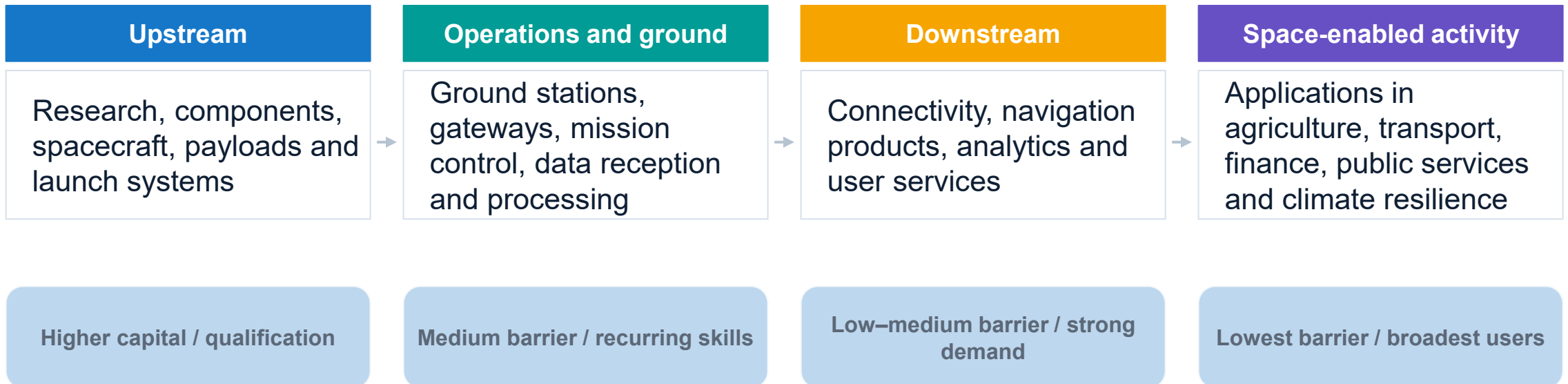


Emerging nations can capture value fastest where space capabilities meet concrete development, resilience and competitiveness needs.



A practical value-chain lens for developing countries

Not every country enters through spacecraft manufacturing: the value chain offers different levels of access and impact.



Which part of the value chain best matches national needs, existing industrial strengths and credible customer demand?



Three illustrative high-potential entry pathways

A common progression: create value → build operational capability → deepen industrial capability.

1 EO + geospatial AI

Convert open and commercial satellite data into decision-support services for agriculture, water, climate, cities and disaster risk.

Access level: **LOW**

WHY THIS IS FEASIBLE

- High national demand: agriculture, water, climate, urban planning, mining and disaster risk.
- Value is shifting from raw imagery to analytics, AI and actionable services.
- Local firms have an advantage where domain knowledge and language/context matter.

2 Ground + operations

Build national capability to receive, process and operate space systems: ground stations, mission control and payload operations.

Access level: **MEDIUM**

WHY THIS IS FEASIBLE

- Every satellite needs ground connectivity and operations.
- Countries can start with shared stations, cloud mission control and commercial networks before owning full infrastructure.
- Operations create recurring high-skill jobs and know-how for sovereign missions.

3 Payloads + AIT

Use hosted payloads, CubeSats and testing facilities to move gradually from users of space to builders of space systems.

Access level: **MEDIUM**

WHY THIS IS FEASIBLE

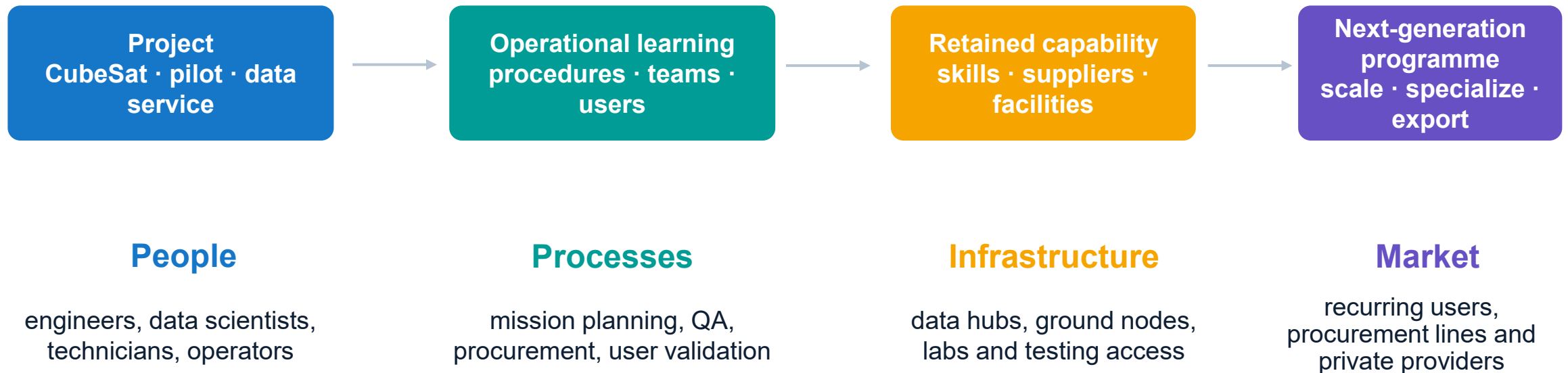
- Hosted payloads, rideshare and standardized smallsat platforms reduce the cost of entry.
- AIT and payload work create reusable industrial capability rather than one-off procurement.
- Countries can specialize in selected subsystems before becoming a satellite prime.

Strategic logic: create demand and skills before heavy infrastructure; use sovereign needs as an anchor market.



A project should leave lasting capability

A major part of the strategic value of a mission is the capability that remains after the mission is over.



The central question is : what national capability did the project create, and how can it be reused?



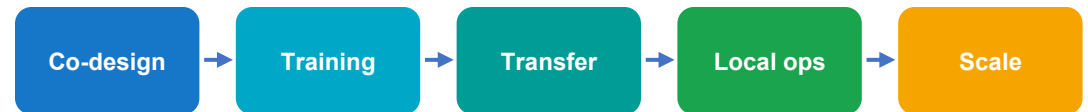
International cooperation should accelerate capability

The test of cooperation is not only what is delivered, but what capability remains.

Transactional Cooperation



Capability-building partnership



UNOOSA contribution

- ▶ Space2030 links economic benefits with society, accessibility and diplomacy.
- ▶ UNOOSA's Space Economy Initiative supports knowledge, exchange of national experience and tailored technical assistance.
- ▶ UNOOSA Programme on Space Applications

Workshop implication: partnerships should move from “access provided” to “capability retained”.



Questions to carry into the workshop

The expected outcome is a set of practical pathways, not a single model for all countries.

- | | | |
|-------------|-----------------|---|
| 1. VALUE | Our opportunity | Where can space deliver measurable development and resilience benefits? |
| 2. ENTRY | Our priority | Where can our existing capabilities participate competitively? |
| 3. SCALE | Our next step | Which partnership or action can turn this opportunity into sustained value? |
| 4. ENABLERS | Our evidence | Which policy, finance and partnership choices can remove that constraint? |

From workshop discussions to outcomes

Case Studies

Transferable lessons

Enabling ConditionL

Actionable National Pathways

Success means more countries creating, using and retaining the benefits of space.