

# The ESA Marketplace

*ScaleUp @ ACCESS*

# The Common Challenges

01 

## Global competition

Global competitors set the price floor before we leave the ground.

02



## Scaling capital

Late-stage rounds dry up exactly when hardware needs them most.

03



## Market timing

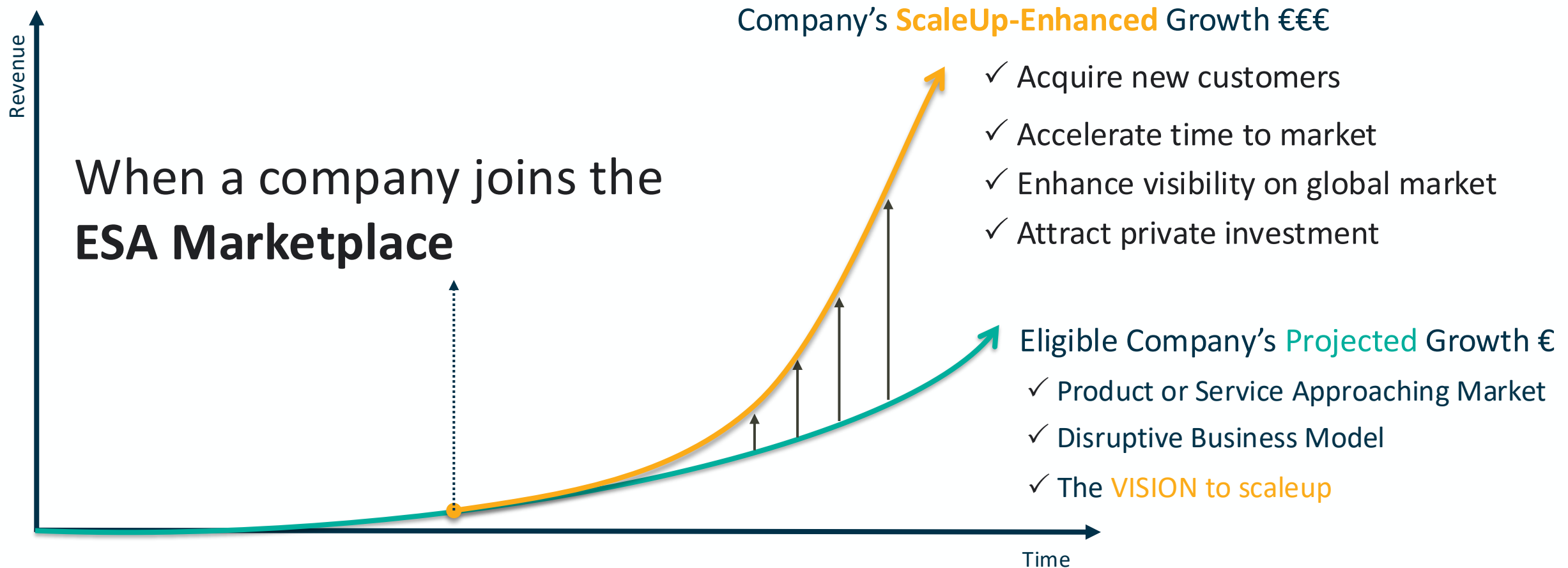
The launch window for category leadership closes in 24–36 months.

*Miss one and you lose ground. Miss two and you exit the market.*

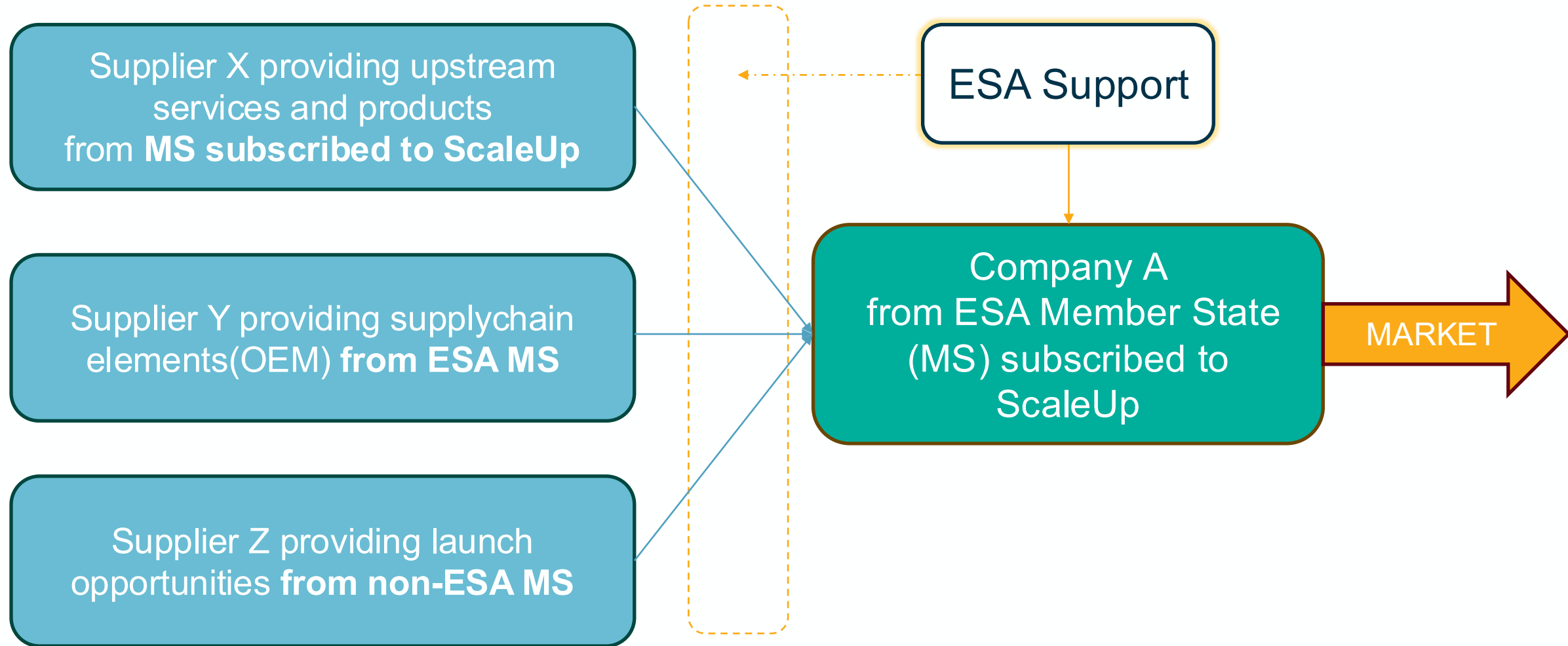
# Mission Statement

*Foster the development of industrial players on upstream and downstream new and emerging markets to achieve sustained commercial growth.*

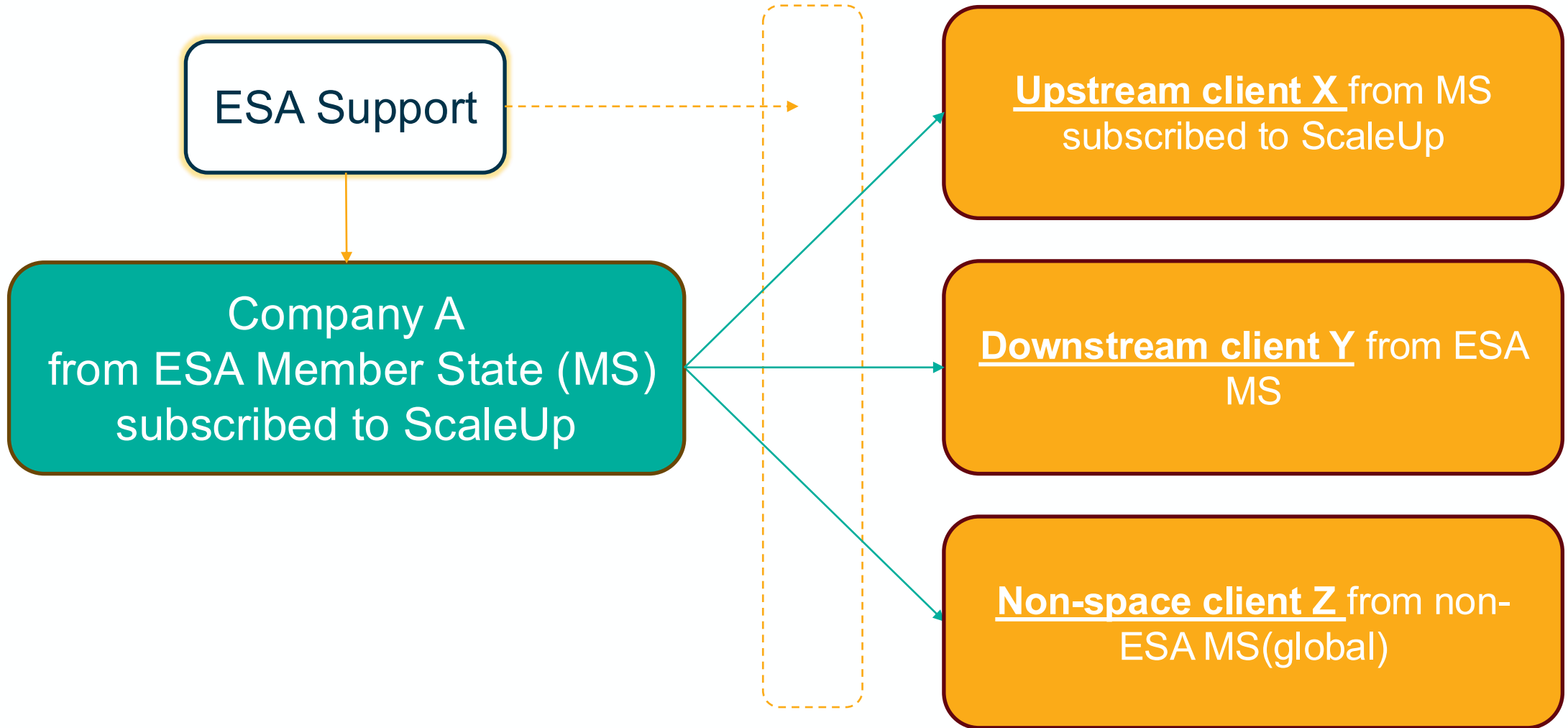
# The ESA Marketplace effect



# Accelerate time to market – Financial support for bottleneck purchases that unlock sales



# Acquire new customers – ESA covers the cost associated with customer acquisition



01



## No technical development

Funding supports market activities, not R&D. Technology must already be built.

02



## High-TRL products only

Eligible offerings must reach TRL 7 or above — flight-proven or near-flight-ready.

03



## Co-funding tapers over time

Capped at 80% for SMEs and 50% for large enterprises, decreasing across phases.

# Marketplace Case Study: Space Cargo Unlimited (SCU)



Space Cargo Unlimited (LX) is developing the BentoBox, a commercial in-orbit manufacturing and demonstration service that enables customers to test, validate and manufacture in microgravity through early deployments on orbital freeflyer platforms such as ATMOS Phoenix.

With the support of the ESA Marketplace, SCU accelerates market adoption, builds flight heritage, and secures the first anchor customers. These first commercial missions benefit from substantial risk and cost reduction, with ESA contributing 80% support to the final contract value.

The ESA Marketplace support helped SCU land first commercial customers and raise €40M in total — within six months of closing the ESA contract and onboarding first two customers.

**The result: €4M public → €40M total raised — a 10x multiplier of private to public investment .**

# Marketplace Case study: Aerospacelab – Xona



Aerospacelab (BE) provided an end-to-end mission service based on its new VSP-150 microsatellite platform, including satellite manufacturing, payload integration, launch integration, commissioning, operations and decommissioning.

Their commercial customer - Xona Space Systems (USA), with whom they did an in-orbit demonstration mission for Xona's Position, Navigation and Timing (PNT) payload was key step towards the deployment of the future PULSAR constellation for high-precision navigation services supporting emerging applications such as autonomous transportation.

The ESA Marketplace support helped Aerospacelab land first international commercial customer, as well as close a follow up contract of 12 more satellites

**The result: x12 return on revenue, as well as major impact on fundraising €125 M fundraising the following year (11x multiplier on ESA Marketplace total investment vs private investment)**