

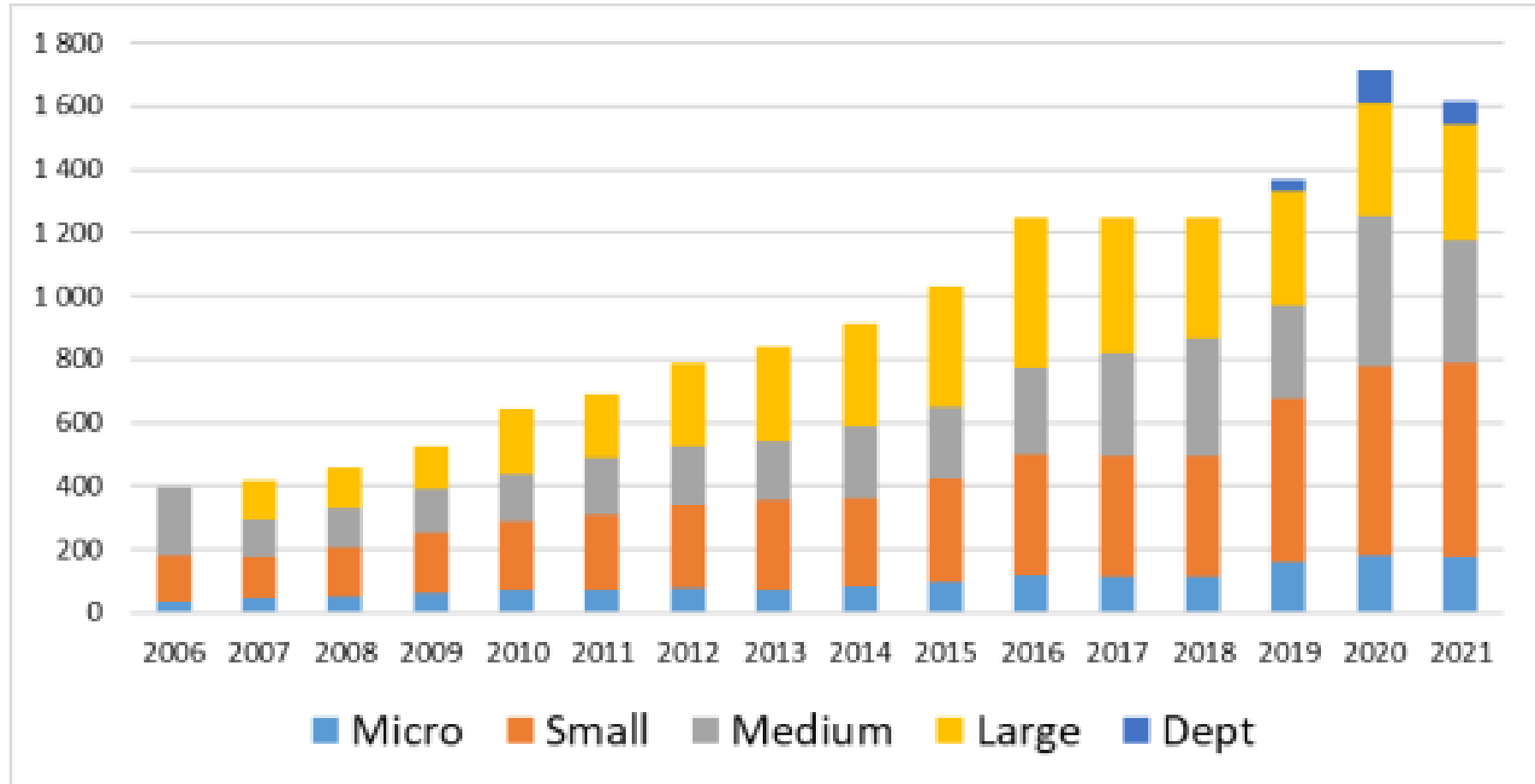


Private Sector Contribution to Sustainable EO

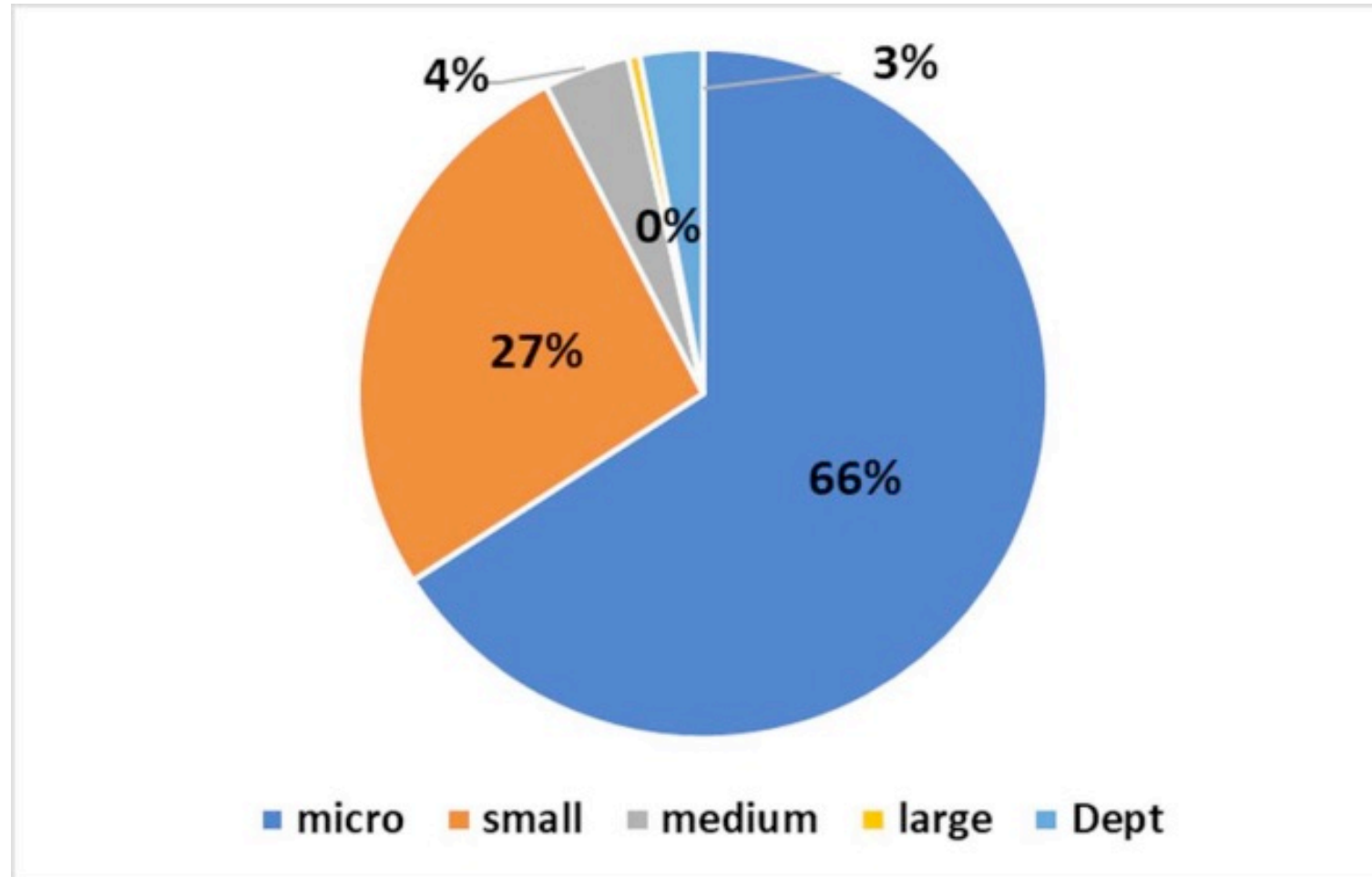
Giovanni Sylos Labini
EARSC & Planetek Italia



Revenues of EO DS



A Fragmented Industry



From ESA/EARSC EO Industry Report 2022

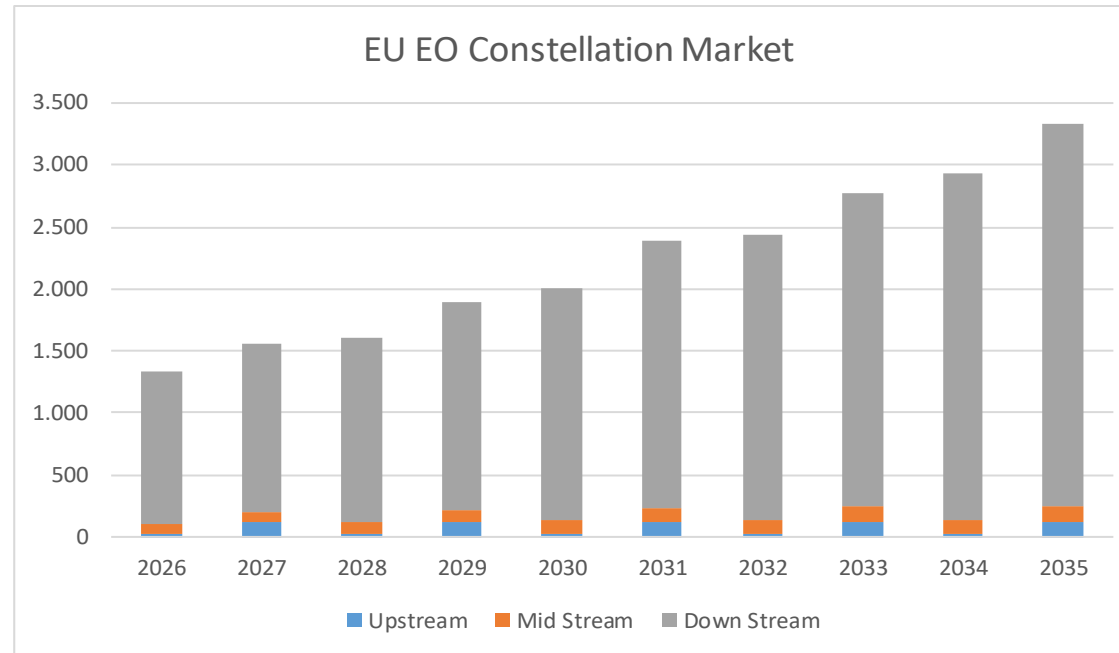
Future European Market opportunities for small satellite constellation

☐ 2023 0.8 B€

☐ 2026 1.3 B€

☐ 2031 2.000.000 IoT dev

IRIDE TAM Assessment



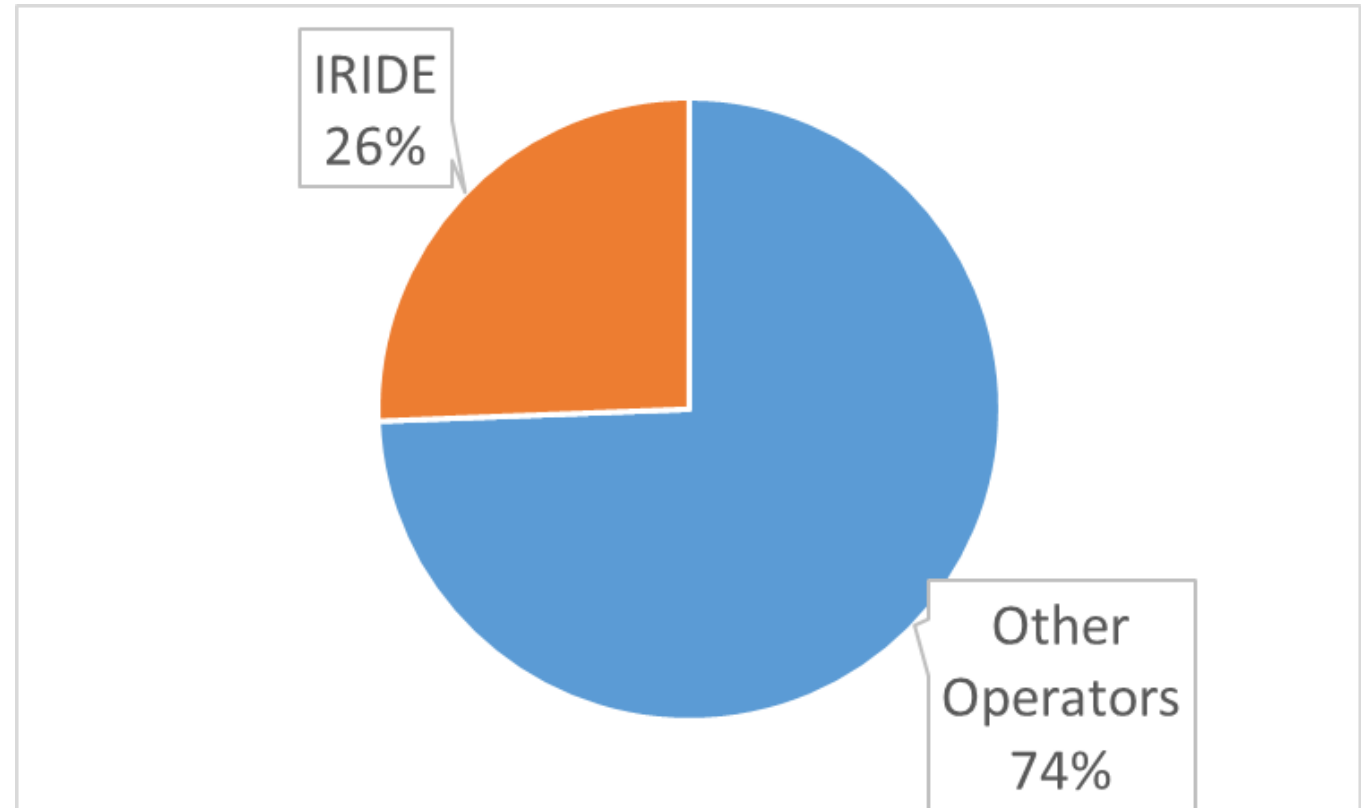
	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	CAGR	Cumulative
Upstream	19	115	21	126	23	129	23	128	21	128		733
Mid Stream	83	86	93	98	107	112	115	119	123	126	3,10%	1.062
Down Stream	1.233	1.353	1.496	1.664	1.874	2.153	2.301	2.533	2.789	3.071	10,10%	20.468
Total EO	1.335	1.554	1.610	1.889	2.004	2.393	2.439	2.780	2.933	3.325		

Note: AIPAS elaboration on NSR Data upstream indication about 34 satellite with a 5 years estimated lifetime and a recurrent cost of 7M€/unit

EU Smallsat Constellation Market

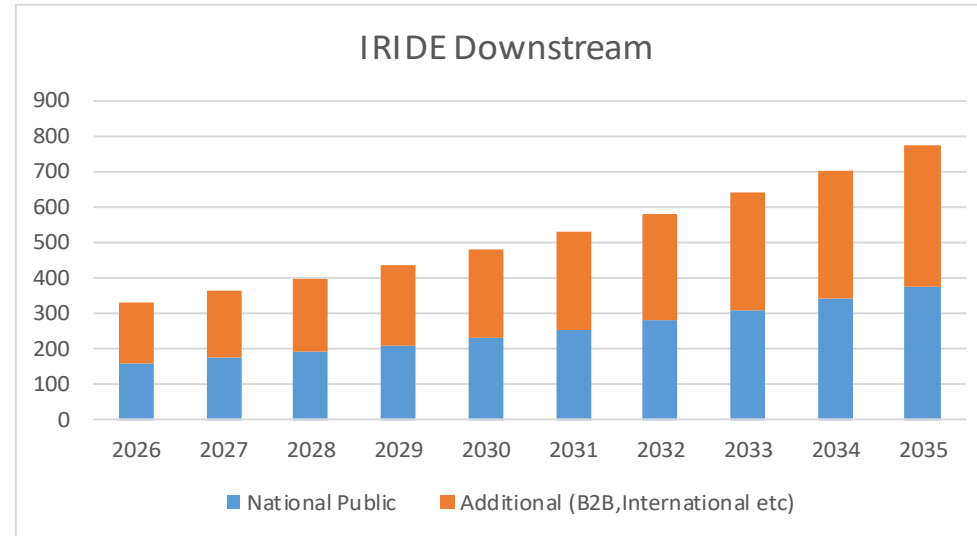
Downstream Cumulative
2026-2035

- Total Market M€ 20.468
- IRIDE M€ 5.243



AIPAS elaboration on NSR Data E.C. 2022

IRIDE Downstream Market



National Public
Additional
(B2B, International etc)
Total IRIDE

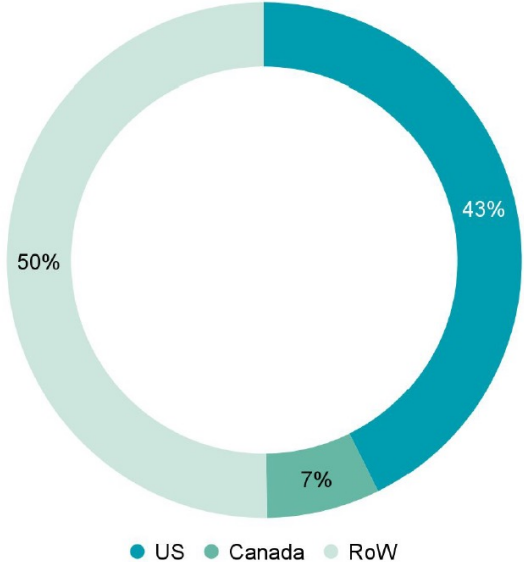
	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035
National Public	159	174	192	211	232	255	281	309	340	374
Additional (B2B, International etc)	170	187	206	227	250	274	302	332	365	402
Total IRIDE	329	362	398	438	482	530	583	641	705	776

- The analysis places IRIDE about 25% of the EU Smallsat constellation DS market.
- IRIDE DS sales in 2026 will be 159 M€ from Italian PA demand and 170 M€ from European B2B and European PA demand (values without sales outside Europe or access to international markets)

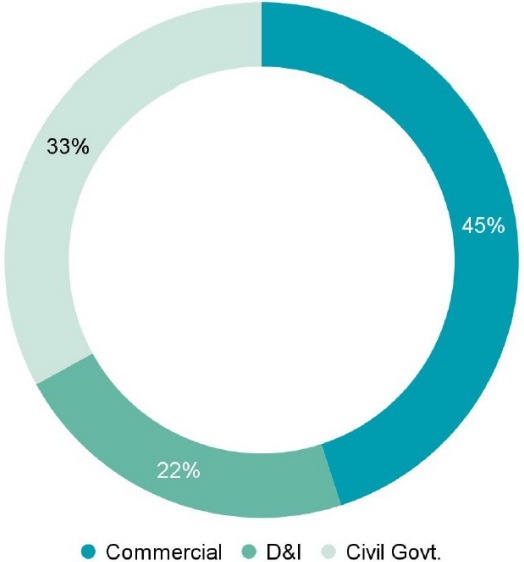
A Typical U.S. Competitor Revenue Stream



FY'22 Revenue by Geography

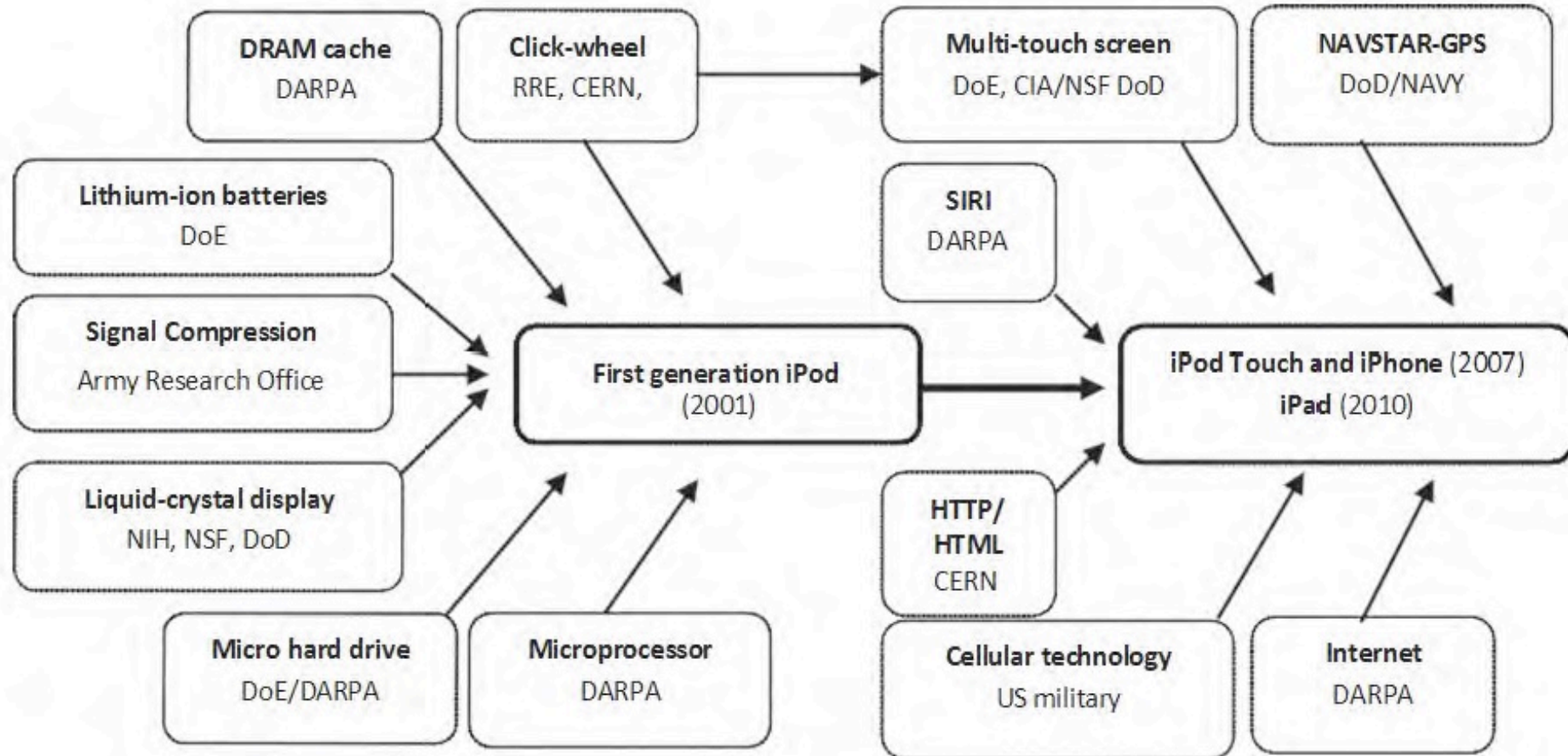


FY'22 Revenue by Customer Type




Total Sales 135 M\$


Government and Smartphone



Mission-Oriented Innovation for EO



Opportunity: The Copernicus program can spearhead mission-oriented innovation developing dedicated EO missions to address them.



Action: Integrate Copernicus into legislative efforts related to Climate Change, Sustainable Development, Security, and Defence..

Commercial Development and Anchor Demand




Opportunity: Europe can use the Copernicus program as an anchor demand to nurture and grow its space sector. This can translate into new partnerships where public and private entities share risks and rewards.

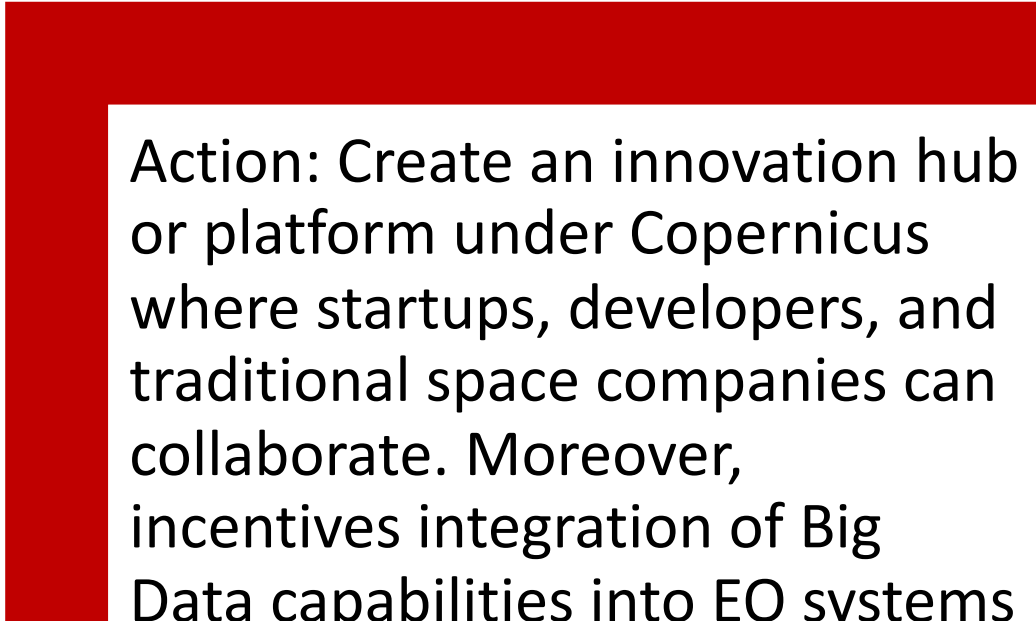


Action: Adopt "as-a-service" models for EO missions, promoting the commercial sector's role. Europe could invest in services allowing the private sector to develop and operate the satellites.

Embracing Digital Transformation



Opportunity: Many new EO services can emerge by integrating Deep-Tech technologies into the Copernicus program. These services can leverage AI for real-time data analysis, harness HPC for quick data processing, and utilize IoT to connect various sensors and platforms seamlessly.



Action: Create an innovation hub or platform under Copernicus where startups, developers, and traditional space companies can collaborate. Moreover, incentives integration of Big Data capabilities into EO systems ensuring Copernicus remains relevant in the age of data-driven decision-making.

Conclusions

Europe can lead in the rapidly evolving EO space industry:

- By adopting a mission-oriented innovation approach
- Leveraging commercial development
- Leading digital transformation of EO in Space

The key lies in a synergistic collaboration between public entities, the space industry, and the tech sector to create an innovation ecosystem that drives technological advancement and addresses pressing global challenges.