



BUSINESS
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Greece

SUPPORTERS OF SPACE-CRETE

Jorge-A. Sanchez-P.

Director, www.esa-bic.gr

Chairman, www.si-cluster.gr

Co-founder, www.corallia.org

Co-founder, www.jnp.gr

Partner, www.coralliaventures.vc

Member of the SC, www.theegg.gr

- CCEST is a strategic infrastructure investment of national importance, addressing a critical gap in Greece's space value chain and bridging advanced research and space-qualified industrial deployment.
 - It enables technology maturation (TRL2→6), aligned with institutional requirements. Its AIT capabilities will lower barriers for SMEs, accelerate time-to-market, and enhance national technological autonomy and industrial credibility.
 - si-Cluster recognises CCEST as a strategic technology node and will structure collaboration around four pillars:
 1. Industrial Competitiveness & Infrastructure Access
 2. Innovation Translation & Ecosystem Orchestration
 3. Talent Pipeline, Skills & Brain-Gain
 4. Strategic Alignment & Market Orientation
 - SPACE-Crete can become a cornerstone of the Greek Space Ecosystem, strengthening national capabilities and European strategic autonomy.
- A significant barrier of startups is the lack of accessible, affordable, and high-standard testing infrastructure, especially for those developing space-hardware due to the high cost and logistical complexity of accessing certified AIT facilities.
 - SPACE CRETE plans to deploy ECSS-compliant testing labs in Crete. It will allow startups to de-risk their technologies locally and accelerate their path to market readiness.
 - We envision a robust, bi-directional partnership between ESA BIC Greece and CCEST, structured around a seamless "Lab-to-Market" pipeline:
 1. The Innovation Pipeline
 2. Infrastructure for Incubatees
 3. Mentoring & Investment
 - SPACE-Crete is not just a research project; it is a strategic infrastructure investment that complements the soft-power support ESA BIC Greece provides. It will strengthen the foundation upon which our startups build.



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WHY DO WE CARE FOR SPACE?

Space in our daily life – Telecom Systems



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Space in our daily life – GNSS



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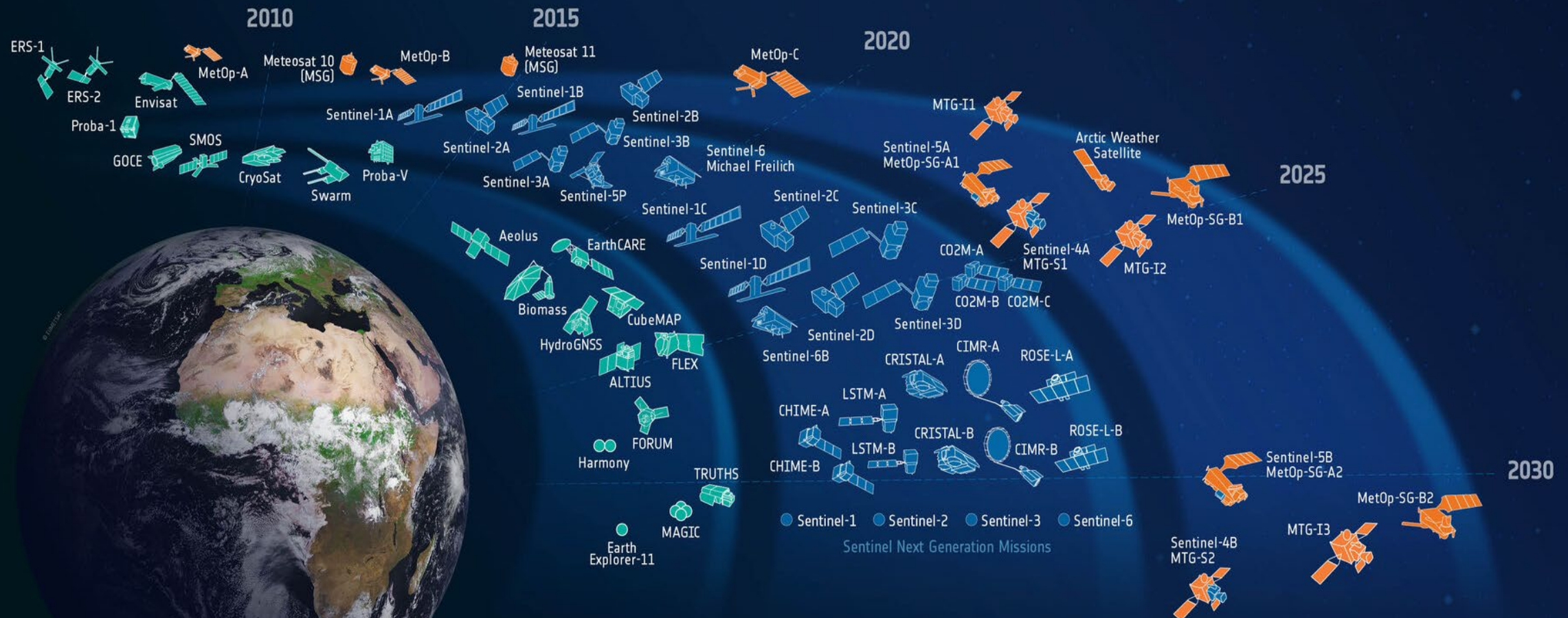


Space in our daily life – EO Systems



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Science



Copernicus



Meteorology



Space in our daily life – Space Inventions



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- Memory foam
- Smartphone camera sensors
- Cordless drills and handheld vacuum cleaners
- Fire-resistant fabrics and protective equipment
- Compact water-purification systems
- Scratch-resistant eyeglass lenses
- ...
- Freeze-dried and vacuum-packed foods
- Aerogel insulation
- Space-derived anti-corrosion coatings
- Advanced prosthetic-limb components
- Space blankets and reflective thermal insulation

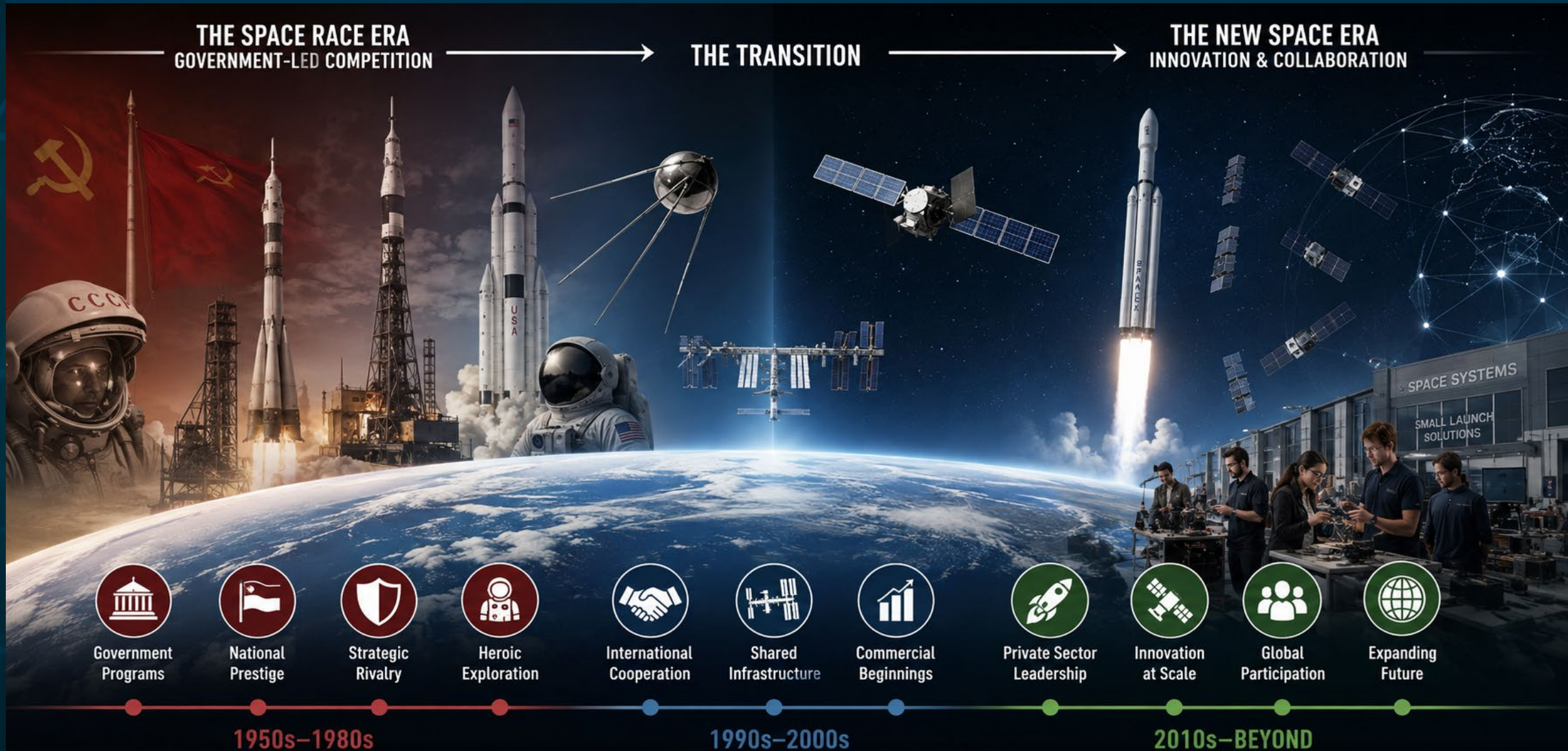


From Space Race to NewSpace



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Space Economy – Market Size in 2025



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UPSTREAM MARKETS

BUILDING THE INFRASTRUCTURE

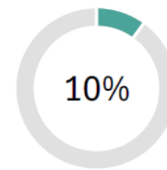


Global

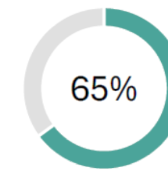
75b€ +20%

78% **Manufacturing**
22% **Launch**

Europe's position in the upstream (supply view)



Europe's captured
share of the global
upstream market



Europe's captured
share of its **accessible**
upstream market

DOWNSTREAM MARKETS

DELIVERING VALUE
THROUGH SERVICES

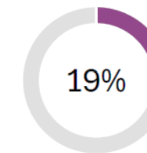


Global

489b€ +7%

77% **GNSS** (incl. enabled services)
22% **Satcom** (incl. video services)
1% **Earth observation** (incl. value-added services)

Europe's position in the downstream (demand view)



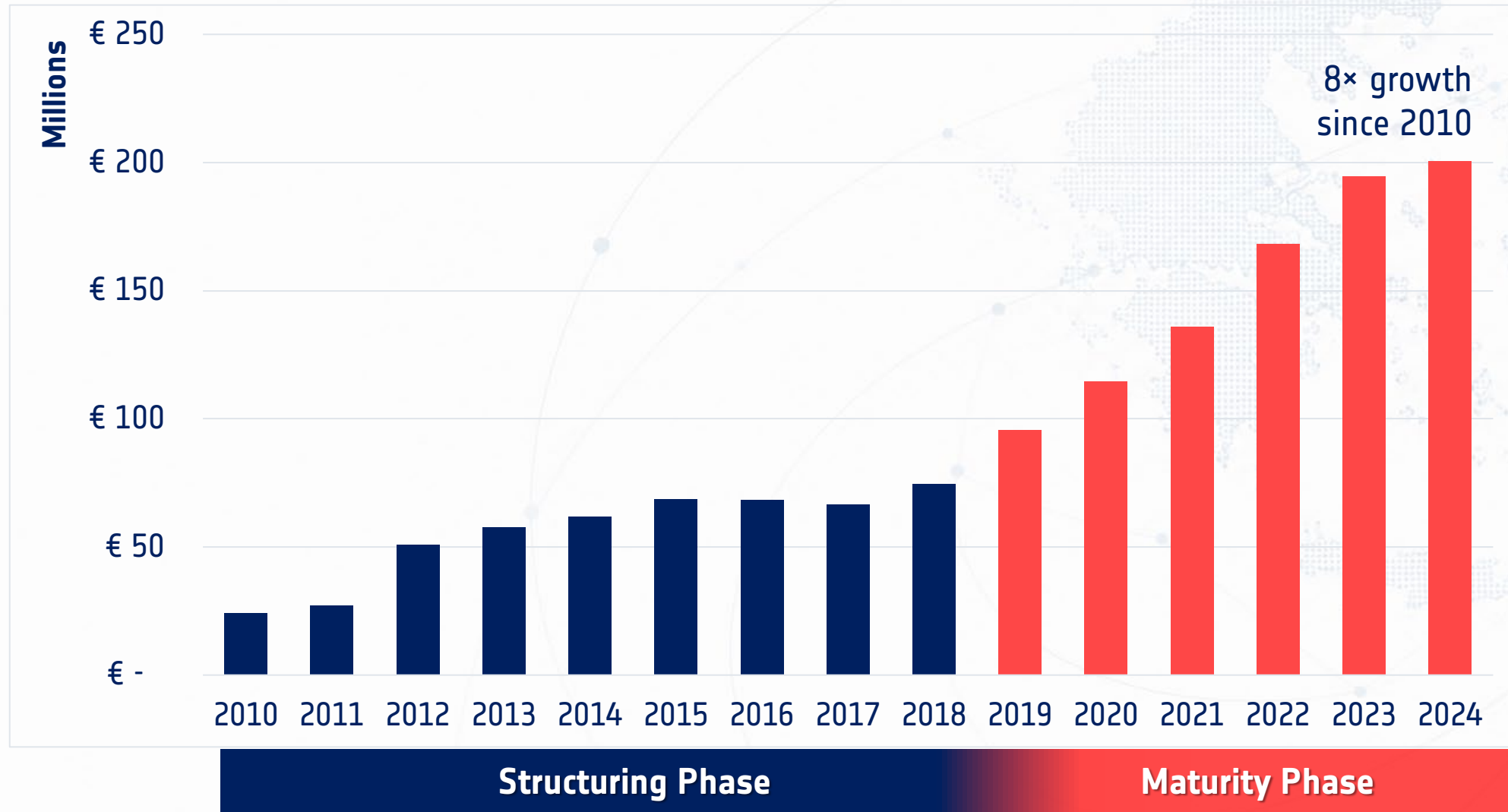
Europe's share of the global
downstream market demand

Space Activity in Greece – SME Turnover



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Space Economy – Public Investments



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PUBLIC INVESTMENT BUILDING CAPABILITIES



STRATEGIC AUTONOMY



SCIENCE & EXPLORATION



SECURITY



INFRASTRUCTURE



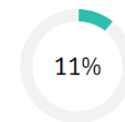
LONG-TERM IMPACT



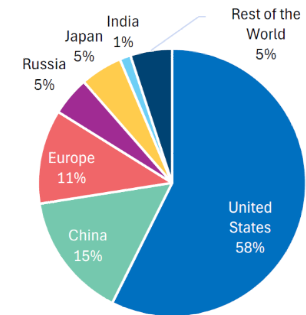
Public Investment in Space

Global **119b€** -3%

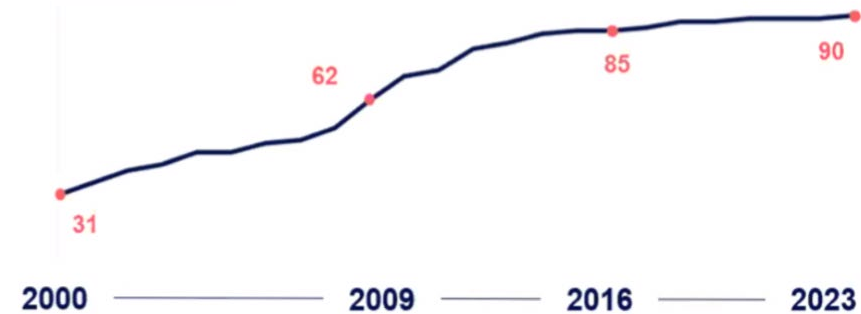
Europe **13.5b€** +12%



Europe's share of global
space public funding



COUNTRIES INVESTING IN SPACE



Space Economy – Private Investments



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PRIVATE INVESTMENT DRIVING INNOVATION & GROWTH



INNOVATION



SCALABLE BUSINESS



COMPETITION



AGILITY

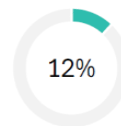


MARKET OPPORTUNITIES

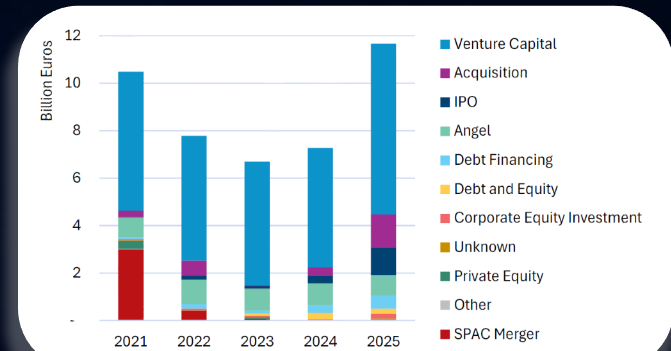
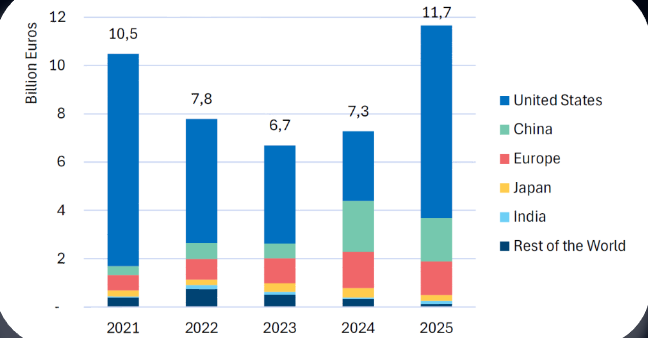
Private Investment in Space

Global **11.7b€** +60%

Europe **1.4b€** -8%



Europe's share of global
space private investment



ESA Budget CM25



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TOTAL CONTRIBUTIONS
APPROVED AT CM25

22.1 B

+ 17%
vs. 2022 (CM22)

Country	2022 CM22 (M€)	2025 CM25 (M€)	Change (M€)	Change % vs 2022
Austria	227	336	+109	+48.0 %
Belgium	940	1,109	+169	+18.0 %
Czech Republic	145	186	+41	+28.3 %
Denmark	134	254	+120	+89.6 %
Estonia	25	58	+33	+132.0 %
Finland	147	233	+86	+58.5 %
France	3,136	3,599	+463	+14.8 %
Germany	3,476	5,067	+1,591	+45.8 %
Greece	86	127	+41	+47.7 %
Hungary	87	204	+117	+134.5 %
Ireland	94	156	+62	+66.0 %
Italy	3,059	3,462	+403	+13.2 %
Luxembourg	131	140	+9	+6.9 %
Netherlands	459	569	+110	+24.0 %
Norway	278	292	+14	+5.0 %
Poland	194	731	+537	+276.8 %
Portugal	113	203	+90	+79.6 %
Romania	121	78	-43	-35.5 %
Slovenia	20	46	+26	+130.0 %
Spain	920	1,854	+934	+101.5 %
Sweden	313	299	-14	-4.5 %
Switzerland	626	771	+145	+23.2 %
United Kingdom	1,878	1,706	-172	-9.2 %
Latvia	3	6	+3	+100.0 %
Lithuania	5	13	+8	+160.0 %
Slovakia	12	14	+2	+16.7 %
Canada	81	408	+327	+403.7 %

Hellas-Space 2.0



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Greek National Space Programme – Phase II





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GREECE IN SPACE

Space in Greece – History



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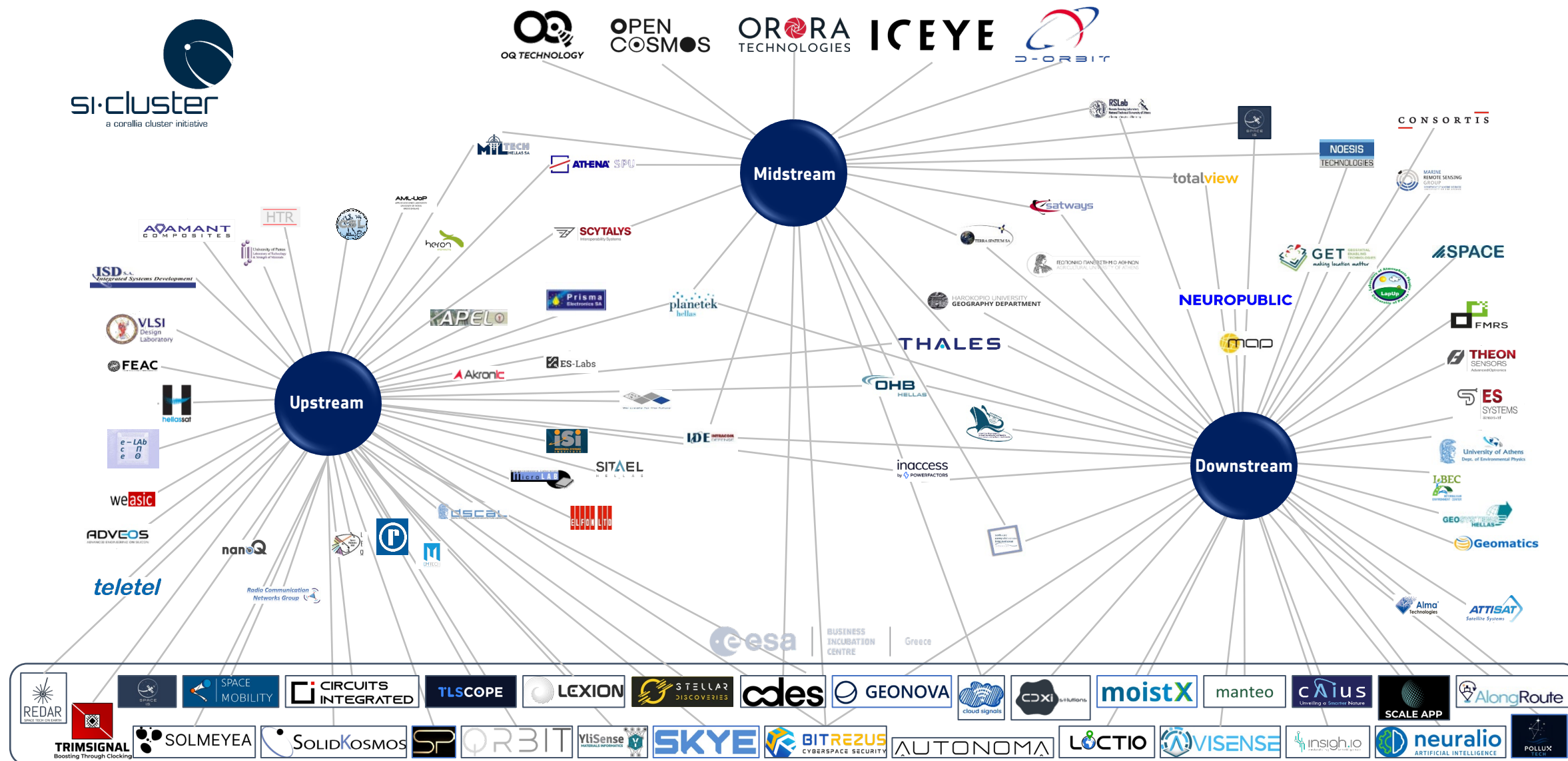


The Greek Space Ecosystem – Value Chain



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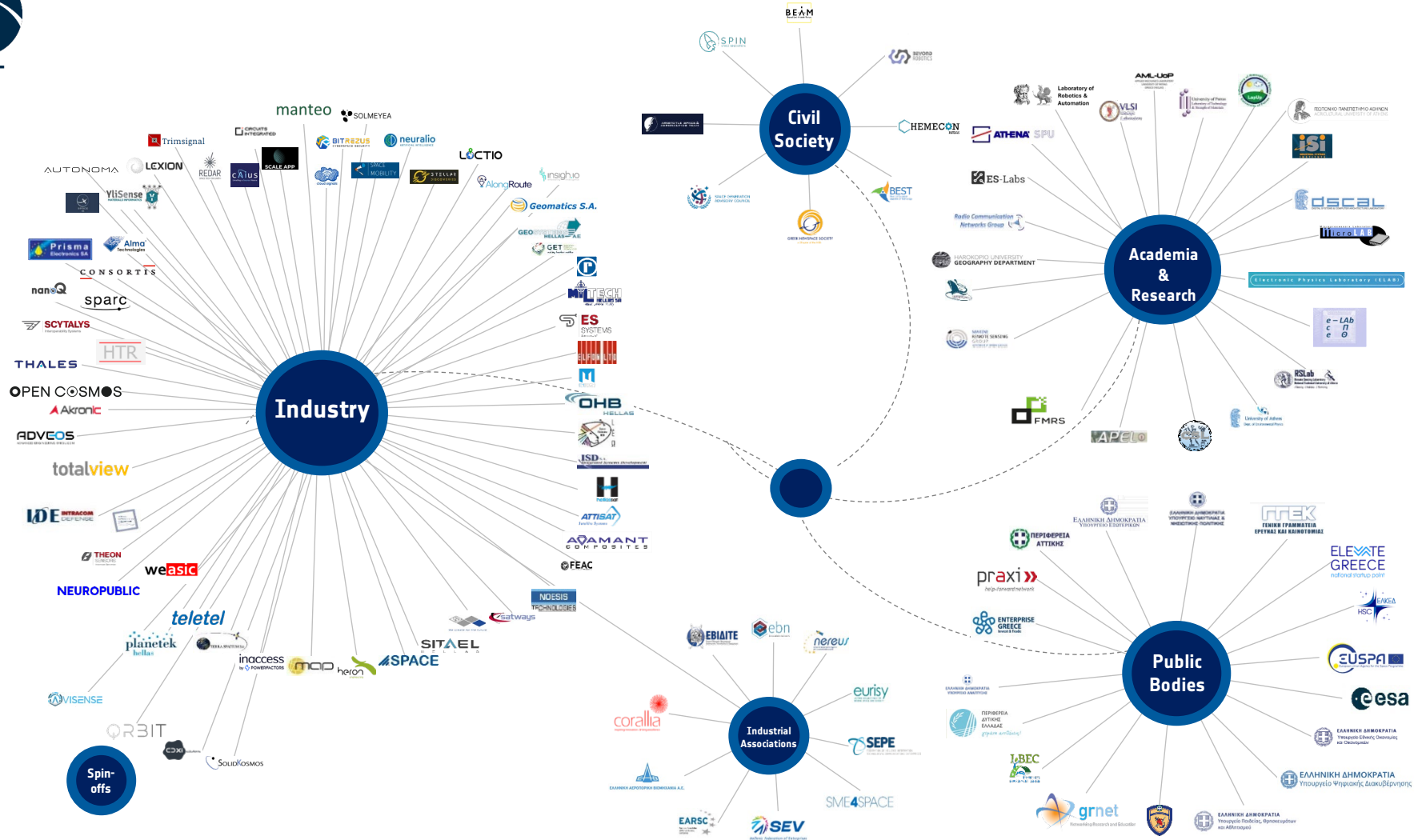


The Greek Space Ecosystem – Quadruple Helix



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Greek Space Ecosystem Catalogue

Organisations - Technologies - Products - Services - Applications in the Space Sector in Greece



 Explore the Catalogue

 Search with Advanced Filters

 Search by Category



HELLENIC REPUBLIC
Ministry of Digital Governance



HSC HELLENIC
SPACE CENTER



Εθνική Επιτροπή Βιομηχανικών
Αυτομηχανικών Τεχνολογιών &



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Greek Space Ecosystem Catalogue



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The screenshot displays the HELLASMAP platform interface, which is designed for mapping and analyzing company locations in Greece. The interface is divided into three main sections:

- Left Panel (Filters):** Contains search and filter options. At the top, there are buttons for "Explore the Catalogue" and "Search by Category". Below these is a "Hide filters" button. A search bar is labeled "Search for". A "Search with Filters & Map" button is prominently displayed. Below the search bar, there are several filter categories, each with a dropdown menu: "Organisation Type", "Value Chain Position", "Category", "Organisation Size (Em)", "Organisation Size (Tur)", and "Ownership Type". At the bottom of the filter panel, there is a "Clear Filters" button.
- Center Panel (Company Cards):** Displays a list of companies, currently showing items 1 through 20. The first card is for "11tensors", which develops generative AI and machine learning technology. The second card is for "PHAIST'S INVESTMENT FUND", which invests in a better future. The third card is for "5G Ventures", a Greek investment-management company. Each card includes a company logo, a brief description, and a location pin indicating its location in Greece.
- Right Panel (Map):** A large map of Greece showing the locations of the companies. The map is overlaid with a network of lines connecting the company locations, indicating a network or cluster. The map includes a search bar at the top and a zoom control on the left.

The Greek Space Ecosystem – Regional Foci



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The ESA BIC Greece Startups



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31 startups

Upstream

Downstream

Space Technologies

Electronics & Communications



Spaceflight, Exploration, Robotics



Manufacturing Cybersecurity & TT



Applications

Enabling Solutions for EO



Environment



Maritime



Logistics & Transportation



Geographical distribution of startups

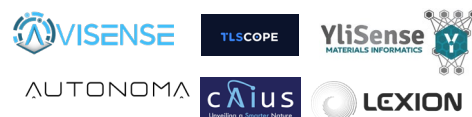
Central Macedonia & Thessaly (7)



Attica (18)



Western Greece, Epirus, Ionian Islands, and Crete (6)





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Support Package for Incubatees



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FINANCIAL SUPPORT

EUR 80,000
non-equity
funding



REPUTATION

Use of the ESA BIC brand
as a door opener to
customers and investors



NETWORKING

Access to the international network
of ESA, Corallia, si-Cluster, and other
support partners



CONSULTING

Up to **20 hours** tech support, **50 hours** of business development support, and **10 hours** of IPR advice



RESOURCES & PERKS

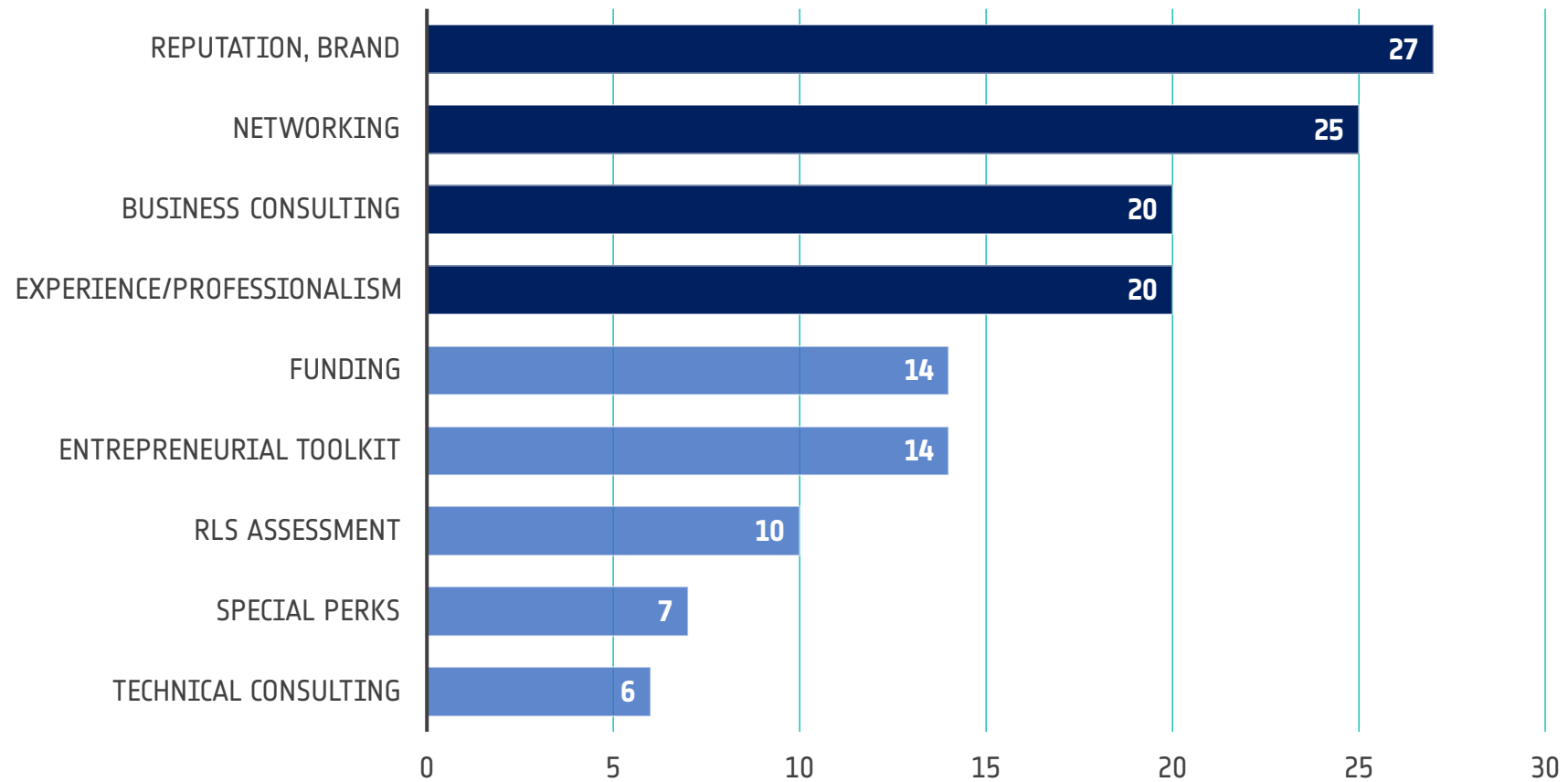
Access to events, high-end
infrastructure and equipment,
software, data, and more

What Incubatees value most



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Net Promoter Score: 94

"How likely are you to recommend the program?"



0 – 6
Detractors



7 – 8
Passives



9 – 10
Promoters

Net
Promoter
Score

=

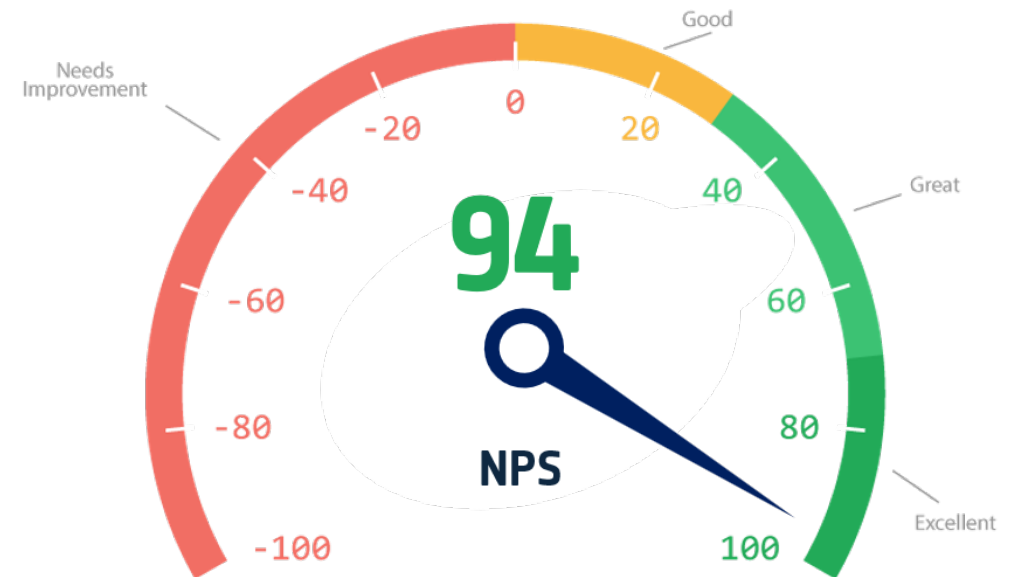


%
PROMOTERS

–



%
DETRACTORS



The Team Behind the Incubation Engine



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Powered by ESA Expertise and the European Network



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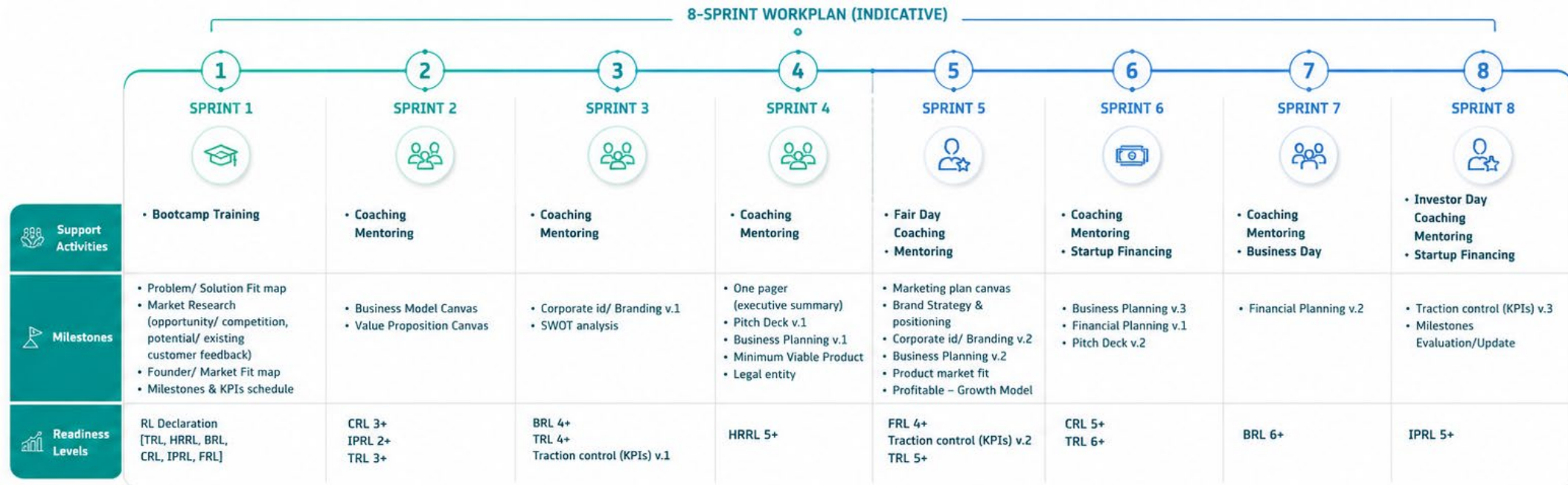


Incubation Approach



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Looking for startups...



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... not older than **5 years** or
on the way to be established in Greece.



... with its members being **residents**
with a working permit in Greece.



... **majority-owned** by
founding entrepreneurs.



... with an **innovative idea** with
a clear **space connection**.



... with a viable **business plan**.



Cut-off dates



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NEXT CUT-OFF

19 October 2026

Future cut-offs

February 2027, October 2027

February 2028, October 2028

February 2029, October 2029

February 2030

**Maximum 5 teams selected at each cut-off*



Application steps



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STEP 0:



Read the Frequently Asked Questions to learn the ins and outs of our Incubation Programme.

STEP 1:



Download the Permanent Open Call Package which introduces the application and evaluation process, the incubation contract and other modalities and contains the templates that should be used by the Applicants.

STEP 2:



Express Interest if you want to ask for a pre-evaluation of your business idea or for clarifications related to the scope and structure of the application and incubation.

STEP 3:



Complete the Application Form using the template and guidance of the Open Call Package.

STEP 4:



Submit your Application and send the files to application@esa-bic.gr with subject "ESA BIC Greece Application – [Startup Name]".

STEP 5:



Expect to be notified of your application eligibility check by the Tender Opening Board (TOB). If a non-compliance of minor nature is identified, the TOB may ask the Applicants to re-submit an updated proposal within 48 hours.

STEP 6:



Present your Application to the Selection Board (SB). This will happen around 3 weeks after the application cut-off date.

STEP 7:



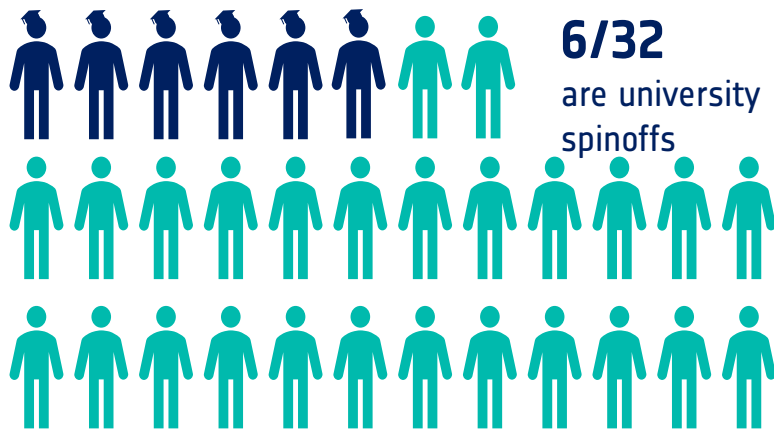
If successful, then wait to be contacted for a contract clarification meeting with ESA BIC Greece to join the Incubator. This will happen around 3 weeks after the SB.

The ESA BIC Greece Startups



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Revenue from customers:

€ 9.3M

Public funding received:

€ 6.5M

**Cumulative since entering ESA BIC Greece*



FTEs:

~90

Female FTEs:

~25

Thank you!



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Do you have a space-enabled idea?

Let's talk.

CONTACT US

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 www.esa-bic.gr



 [esa-bic-greece](https://www.linkedin.com/company/esa-bic-greece)