

How ESA's Third Party Missions support European Commercialisation

Third Party Missions (TPMs) consist of **Earth Observation (EO)** satellites that are owned by commercial and public organisations around the world.

ESA has specific agreements with the organisations to promote the availability of their data, to support research and application development. In parallel, the **activities of the TPM programme help boost commercialisation in Europe**

New space growth

Small, innovative privately owned companies emerging from the new space ecosystem are having an increasing impact on the European EO industry.

ESA's TPM programme is capitalising on – and encouraging – commercial advances in remote sensing by working with these emerging new space start-ups and its primary objective is to support companies from ESA Member States

Expanding collection

More and more missions onboarded as TPMs are taken from the new space ecosystem. Commercial missions recently joining the TPM portfolio include:

- GHGSat
- ICEYE
- Planet SuperDove
- SkySat
- Pléiades Neo
- Vision-1
- Spire
- SatelliteVu
- Unseenlabs
- OroraTech
- constellr

Status 2025

Overall number of instruments **≈ 83**

71

Total TPM missions

30

European missions

65.41 TB

TPM data downloads in 2025

6.02 TB (9%)

TPM data downloads from new space missions in 2023

8.42 TB (13%)

TPM data downloads from commercial missions in 2025

1829

Users who downloaded TPM data from the dissemination system in 2025

≈ 60%

European users of TPM data



Innovation

New space companies create benefits by developing innovative Earth observation technologies that empower new applications. ESA acts as initial customer of the data allowing the data to be promoted within the European user community.

TPM data can also be used by companies supported by ESA's Business Incubation programmes

Data quality

Inclusion in ESA's TPM programme demonstrates that data providers meet the agency's high data quality standards. User trust in this quality helps commercial providers secure further business and growth

Synergy

New space missions included in the TPM programme create opportunity for synergy with institutional missions (such as Sentinels, ESA Earth Explorers & Scout missions) to meet the needs of user communities from different sectors

FACT BOX

TPM programme has supported **80 companies*** since April 2022 to date

* this primarily includes start-ups and scale-ups

ESA's Third Party Missions: empowering commercial innovation in Earth observation

ESA's Third Party Missions (TPMs) foster entrepreneurship and accelerate scientific breakthroughs, enabling informed, timely decision making across Europe. Explore the map to discover how TPM data are helping European companies develop novel applications:



Assessing landfill methane emissions

Kanadevia Inova
Germany

Sustainable energy
GHGSat

Kanadevia Inova used GHGSat data to monitor methane emanating from landfill sites, helping develop a robust framework to quantify these emissions

Monitoring infrastructure stability

Dares Technology
Spain

Infrastructure monitoring
PAZ

Dares Technology used radar data to track millimetre-scale movements of the Bernabéu stadium in Madrid

Mapping the seabed

LS Engenharia Geográfica
Portugal

Cartography
GEOSAT-2

LS Engenharia Geográfica used multispectral data to carry out a detailed bathymetric study of Portugal's Sado Estuary

Illuminating "dark ships"

Ubotica Technologies
Ireland

AI-enabled Earth observation
SkySat

Ubotica showed that its AI model could detect ships using off-nadir satellite data, marking an important step forward for maritime surveillance

Improving maritime surveillance

KSAT
Norway

Maritime monitoring
Unseenlabs

KSAT is using radio frequency data to develop new services for tracking and identifying vessels at sea

Reducing disruption to powerlines

Baltic Satellite Service
Latvia

Forest monitoring
ICEYE

Baltic Satellite Service drew on radar data to detect trees encroaching on overhead power lines, supporting vegetation management efforts

Tracking abandoned boats

AquaGuard Technologies
Sweden

Maritime monitoring
WorldView-3/-4

AquaGuard drew on optical data to develop a platform that tracks recreational boat wrecks and other hazards

Supporting crisis management

Guard Time
Estonia

Emergency response
SkySat & Pléiades

GuardTime used optical data, along with other satellite data, to develop a secure map solution to support emergency responses

Detecting illegal construction work

Datel
Estonia

Remote monitoring services
Pléiades Neo

Datel used Pléiades Neo data to develop a system to help municipalities identify buildings not complying with real estate regulations

Tackling urban heat

LLCLOUD Ltd
Bulgaria

Smart cities and urban monitoring
HotSat-1

LLCLOUD is using thermal infrared data to develop a wearable temperature indicator that enables citizens to mitigate urban heat

Boosting sustainable water management

Hydrohunter
Italy

Below-ground hydrology
COSMO-SkyMed & ICEYE

Hydrohunter used radar data and other data sources to identify underground water resources, helping optimise water extraction for agriculture

Discover more about the TPM programme: earth.esa.int/eogateway/missions/third-party-missions

CCM Companies as of 2026

Sevilla, 2024
Pleiades, Airbus
CCM VHR 2024 Coverage (2m GSD)

 ESA InCubed
Participation
(upcoming, current or past)

Emerging providers

Established providers

Category-1

Category-2 (EU)

Category-3 (non-EU)

Multispectral - $\leq 1\text{m}$



Multispectral - $\leq 4\text{m}$



SAR



Atmospheric
Composition



Thermal IR



Hyperspectral



Radio Frequency



Benefits of CCM and TPM



PROGRAMME OF THE
EUROPEAN UNION

copernicus
Europe's eyes on Earth

co-funded with



The impact of ESA's Copernicus Contributing Missions and Third Party Missions Programmes on Earth observation commercial data suppliers



Boosted revenue, with a 81% (same year) to 125% (following year) rise in revenue* for companies participating in the programmes
**inclusive of ESA contract revenue*



Accelerated employment in companies, with a 15–17% increase in employment



Acceleration of constellation development



Strengthened credibility and trust of customers and investors



Boosted brand reputation



Retention of companies in Europe and attractiveness of the programmes - 67% of European Earth observation emerging data suppliers participating in the Copernicus Contributing Missions Programme would have reduced European involvement without it



Substantial benefits from widened network and technical support

- These results stem from a study commissioned by the European Space Agency to **London Economics and Novaspace**
- Study was conducted among **41 Earth observation companies**. Nearly half (**49%**) had participated in ESA customer activities, while **51%** had not
- The findings highlight that the **success and benefits of programmes such as CCM and TPM are tangible**.
- **Continued monitoring will be important to further consolidate these estimates**, particularly since many of the benefits are expected to materialise over the longer term.





Voices of CCMEs

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CCM accelerated SATLANTIS' transition from optical payload provider to fully integrated Earth Observation mission operator.



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Being recognised as a partner by CCM via an anchor customer contract instils trust on the customer side, while increasing cashflow stability; an important metric for private investment.



“

Joining Copernicus sends a strong signal of confidence by European Institutions in Aerospacelab. The independent MPC data assessment adds to this credibility.



“

ESA's role as anchor customer for the BALKAN constellation accelerates the full launch of EnduroSat's programme.



“

This is a remarkable opportunity to accelerate our growth while making a tangible impact on the preservation of our planet.



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CCM has provided a trusted framework for institutional users to adopt commercial SAR data — de-risking procurement, enabling recurring usage, and building confidence among a wider user base.

