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# CCM Session 1.7 - Commercial innovation supporting European strategic autonomy


*Chairs:*

*P. Fischer (ESA), C. Bamps (DG DEFIS)*

**3<sup>rd</sup> EO Commercialisation Forum**

12-14 May 2026 | Sevilla (Spain)

# CCM Companies as of 2026

 ESA InCubed Participation (upcoming, current or past)

## Emerging providers

## Established providers

### Category-1

### Category-2 (EU)

### Category-3 (non-EU)

Multispectral -  $\leq 1m$



Multispectral -  $\leq 4m$



SAR



Atmospheric Composition



Thermal IR



Hyperspectral



Radio Frequency





# Benefits of CCM and TPM



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## 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.



# Benefits of CCM and TPM



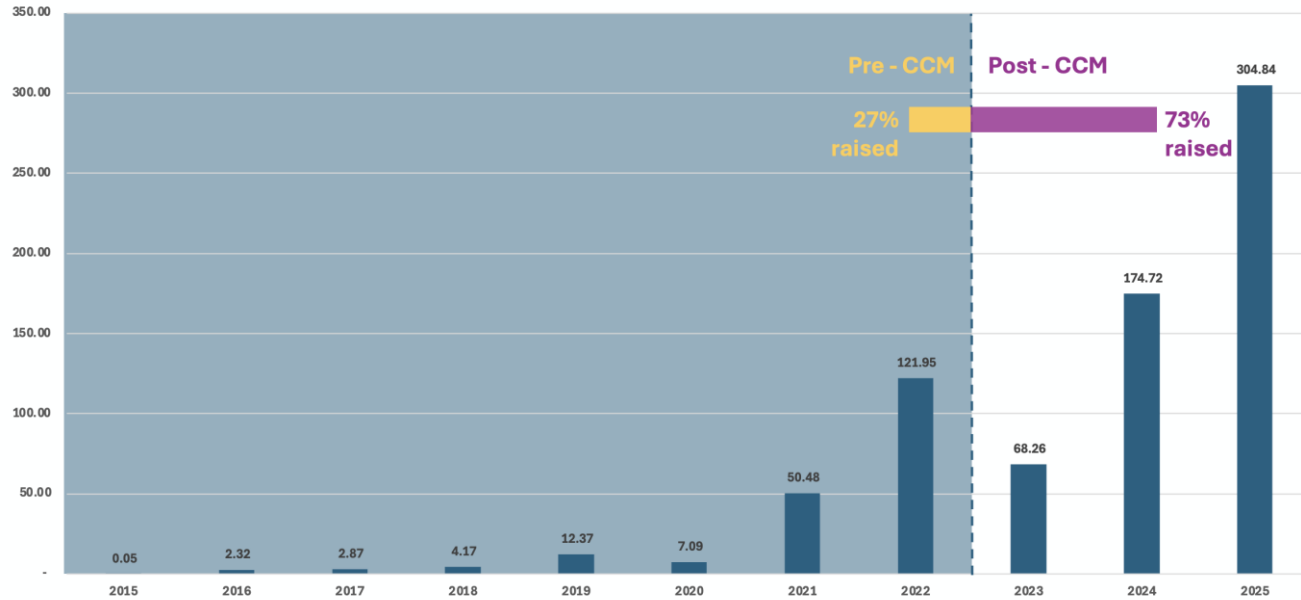
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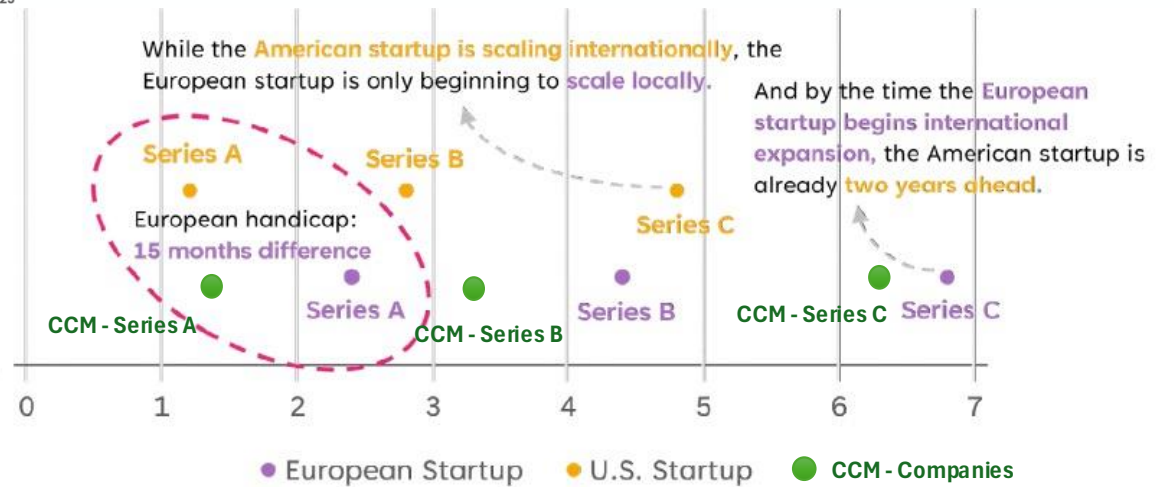
Funding raised by year (CCM Category 1) - M€



73% of fund raised by European Emerging CCM companies (Category 1) companies was done after their onboarding in Copernicus Contributing Missions Activity (period 2015-25)

European Emerging CCM companies (Category-1) outperform other European start-ups in fund raising timing, closing the gap with US start-ups

Assuming the startups raised the Seed round at the same time...



# Voices of CCMs



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



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.



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.





Good afternoon,

Please find the link to the survey for the European EO industry: [SURVEY: COPERNICUS HYBRID CONSTELLATION SOLUTIONS](#).

**Deadline for submission is 05/07/2026.**



## Copernicus Hybrid Constellation Solutions Survey

In case of questions: [DEFIS-COPERNICUS-SURVEYS-EC.EUROPA.EU@ec.europa.eu](mailto:DEFIS-COPERNICUS-SURVEYS-EC.EUROPA.EU@ec.europa.eu).

Why this survey?

The Commission is soliciting information from both upcoming and established companies within the European EO sector (up-, mid- and downstream) to supply satellite earth observation capacity to (possibly) complement the Copernicus Sentinel missions, here referred to as 'hybrid constellation solutions'.

The objective of the survey is to get industrial insights on possible solutions for augmented satellite EO observation capacities which would accompany the Sentinels to fulfil enhanced user needs while boosting European industrial competitiveness and innovative transformation.

Best regards,  
Copernicus-surveys-team

**ESA**, on behalf of the European Commission, will launch a **second survey on the evolution of Copernicus Contributing Missions (2028–2035)**. The CCM survey will be published on **ESA Open Space Innovation Platform (OSIP)** in **July 2026**, and **both surveys will be analysed together** to support a holistic view of Copernicus evolution.