

ESA BIC Germany

Pushing Investments in the NewSpace Economy

esa-bic.de
azo-space.com
space-of-innovation.com



BUSINESS
INCUBATION
CENTRE

20
YEARS

Presented by
Thorsten Rudolph, Managing Director
Anwendungszentrum GmbH Oberpfaffenhofen

ESA BIC Programme in Germany

Economic power from the new space ecosystem

With the Financial Support of



13 ESA BIC Locations in
7 Federal States

426
Startups

Additional
24 Startups
selected

ESA BIC Contractors



Main Partners



ESA BIC Programme in Bavaria

Economic power from 300+ network partners



ESA BIC Programme in Bavaria

Economic growth from the portfolio of seed and scale-up companies

Newspace: Space Transportation Satellite Constellations In-Orbit & Lunar Economy Space Exploration

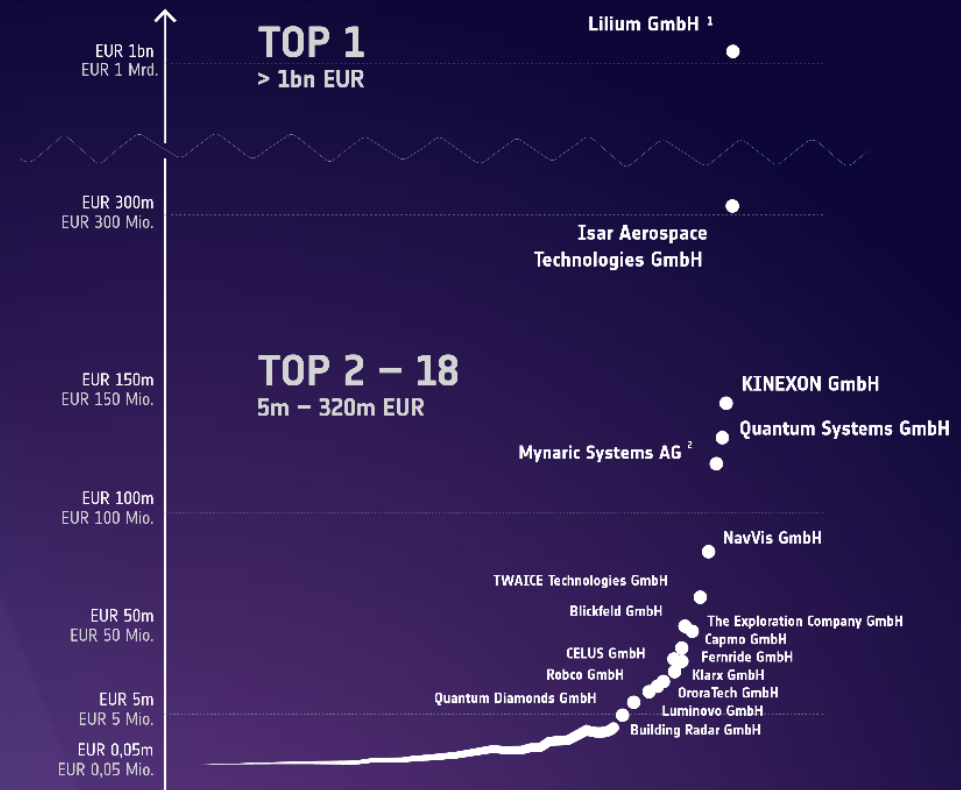
Markets:	KITE//KRAFT	agrista	anosa	cloud analytics	geocledian	GREENSPIN	ajuma	Portables	munevo	bodymonitor	ELYSIUM INDUSTRIES	tinus	
Aviation	HawaDawa	OCELL	ORORA TECHNOLOGIES	ph-las	PINA EARTH	Treems	evalu	KUMOVIS	Reactive Robotics	refit SYSTEMS	terraplasma MEDICAL	teijido	
Agriculture	driodata	Pandia	PICKWERK	RobCo	XPOLI	ERIUM	LET'S GEO	LIV	SPREE	Enari	WAYZ-SOLUTIONS	TWAICE	
Automotive	KINFINITY	lynx	VYOM	abound	Gila	SEMSOTEC GROUP	KINEXON	SPRINT CURVE	rafa	kiutra	manamea	ROKIN	
Consumer	sewts	vydno	nebumind	CELUS	INPUT	CSTREAM	IRIBIS	vectoflow	Electric Edge	ecolotec	VISCOPIC	KAREL	
Energy	intelligence	WASP	GottSave	ALPINA	AEVO	quantum	WAFUSION	ALERION	ANAVIS	AtlasAero	NeuralAgent		
Entertainment	FERNRIE	dlickfeld	TOPSENS	ConstellR	servail	ATMOSPHERE	aviontek	AEOMIQ	FDC-SYSTEM	HAT	LILIUM	eShouts	
Environment	progen	ZIPPERMAST	abau	FRE	CAPMO	Building Radar	CELESTIAL	CADAMI	cloudeo	mynaric	YURI	ADDITIVE SPACE GmbH	
Finance	KEWAZO	klarx	NAVVIS	VEMCON	wahngesision	X-FLIGHT	rapidlasso	OKAPI ORBITS	simplias	+EMLOURE	S	SPiN	
Health	micro HOP	SILENTWINGS	SUNISPHERE	EMM	The Exploration Company	DCUBED	leor aerospace		RETROTRONICS	VALISPACE	UNLEASH FUTURE BOATS	planblue	
Industry 4.0	GeoPard Agriculture		URBAN RAY	ACQUAHMEYER	fluctio	orbit	DRIFT+NOISE	PhySens	seac	SPACE COLLECTOR	KLAUS	BIOVOX	BLACK STARLINE
Infrastructure													
Safety & Security													
Telecommunications													
Transport & Logistics													

Deep Technologies:

- Air Taxis & Drones
- Artificial Intelligence
- Augmented Reality
- Big Data
- Cloud Computing
- Cyber Security
- FoodTech
- GreenTech
- Internet of Things
- New Materials
- MedTech
- Mobile Robotics
- Sensors

Investor Deal Pipeline Bavaria

ESA BIC Bavaria builds on a network of 253 investors

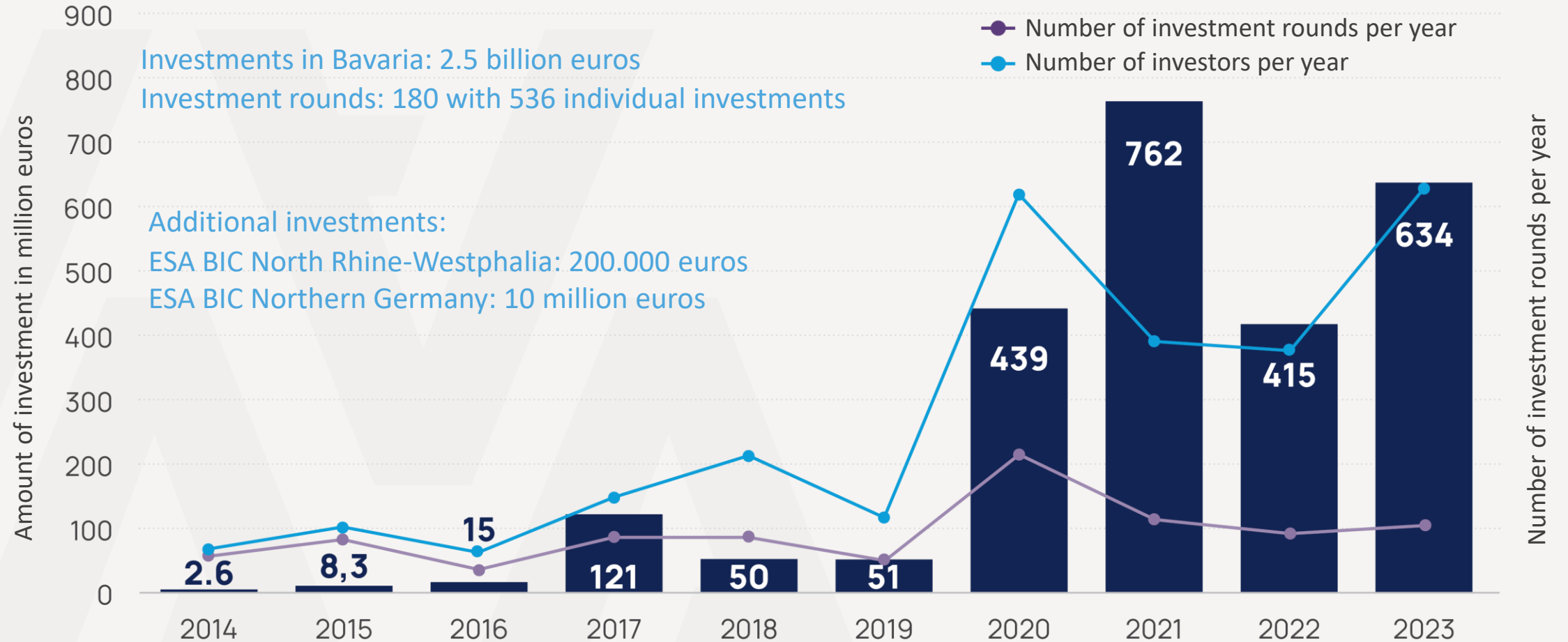


¹ incl. EUR 498m in IPO proceeds
inkl. EUR 498 Mio. an IPO-Erlösen

² incl. EUR 94m in IPO proceeds
inkl. EUR 94 Mio. an IPO-Erlösen

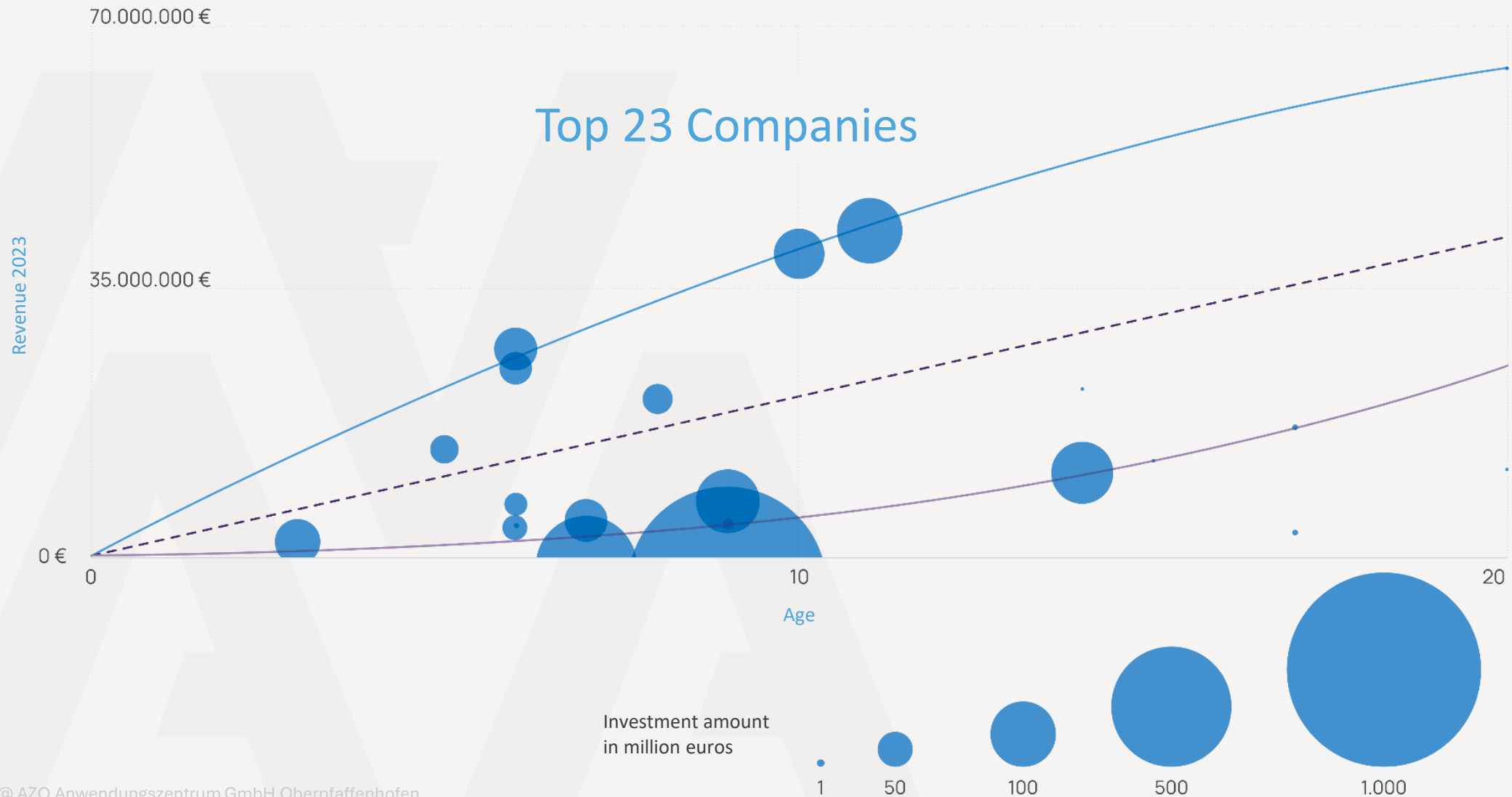
Source: AZO

ESA BIC Bavaria Investments

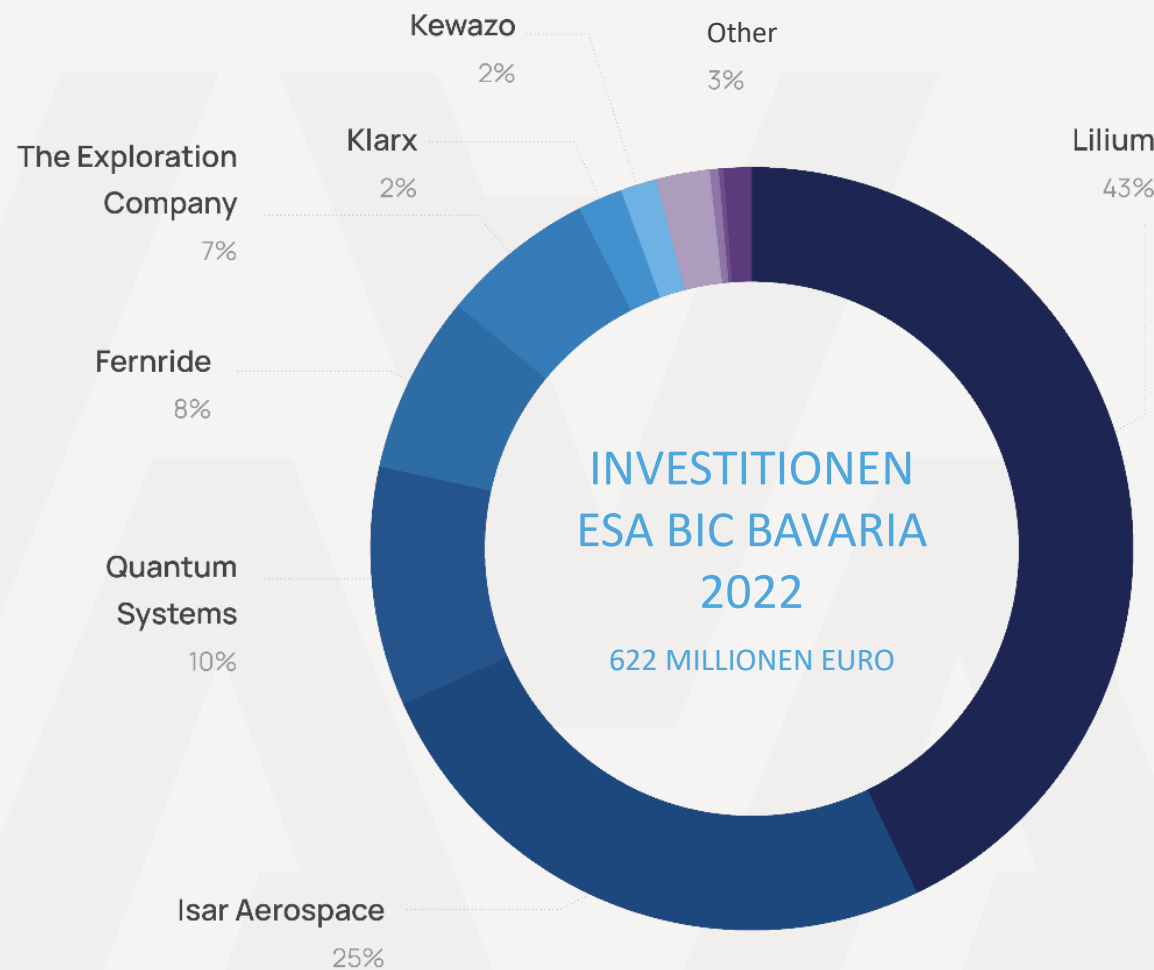


ESA BIC Analysis

Revenue-Investment-Time graph



ESA BIC Bavaria Investments 2023



URBAN AIR MOBILITY

- 266 MIO. € LILIUM GMBH
- 63.3 MIO. € QUANTUM SYSTEMS

SPACE TRANSPORTATION

- 155 MIO. € - ISAR AEROSPACE
- 40.5 MIO. € - THE EXPLORATION COMPANY

CONSTRUCTION MACHINERY

- 11.5 MIO. € - KLARX
- 9.3 MIO. € - KEWAZO

ROBOTICS & TELEOPERATION

- 7 MIO. € - SEWTS
- 2.5 MIO. € - ANGSA
- 46.4 MIO. € - FERNRIDE
- 7 MIO. € - BLICKFELD

CLIMATE & ENVIRONMENT

- 4.6 MIO. € - OCELL
- 1.5 MIO. € - AIRMO
- 4 MIO. € - VECTOFLOW

QUANTUM TECHNOLOGIES

- 3 MIO. € - QUANTUM DIAMONDS

MEDICAL TECHNOLOGIES

- 0.5 MIO. € - DYMIUM
- 0.1 MIO. € - XENI PATCH

ESA BIC Bavaria Companies

Contracted in 2023 and their markets

UPSTREAM

DOWNSTREAM

Satellites

Space
Exploration

In-Orbit
Economy

Infrastructure

Maritime

Industry

Environment

Health

Mobility

Aviation

ACTLABS



AIRMØ



Salutes

ExoMatter



SFDY
STARFLIGHT DYNAMICS



olive

allunderground

SPACESHIP



Roundpeg

VIABLE
Surgery



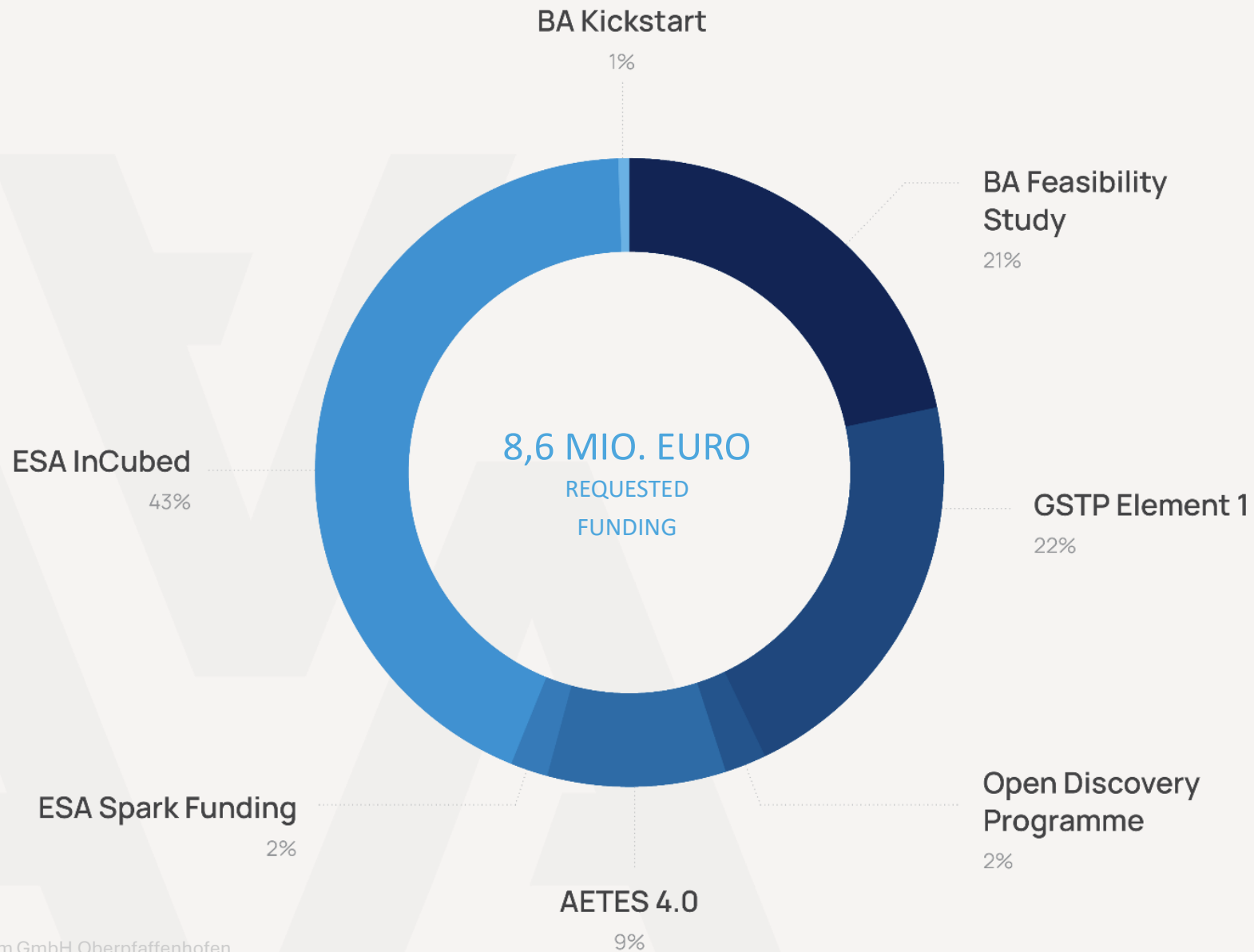
HARDWARE

SOFTWARE

TERNOW
Earth Observation Reimagined



ESA BIC Booster



MAKERVERSE x ESA BIC Bavaria

MAKERVERSE

Your Platform for Sourcing
Industrial Parts

X



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Bavaria



MakerVerse is one of the few suppliers that can follow the fast pace imposed by the new space industry.



Florian Gallean
Mechanical Engineering Project Manager at Aerospace



MakerVerse's personal touch and technical expertise made all the difference.



Francesco Longhetti
Head of WARR Rocketry

Next Stage to Space

managed on behalf of ESA

· · AZO ·
Space of Innovation

Next Stage to Space is to facilitate the European ecosystem for Space Transportation by providing a platform where startups and SMEs can pitch their value propositions to meet the promising fields of innovations identified by Large Space System Integrators.

Objectives & Achievements (2022 - 2024):

- 6 pilot technologies have been identified to provide innovative solutions for ArianeGroup and MTA's needs.
- 50 SMEs and startups from the space and non-space industries have submitted solutions.
- 7 projects between LSIs and solution providers will be funded.

www.nextstage.space



Building
the European
Ecosystem for Space
Transportation Systems