

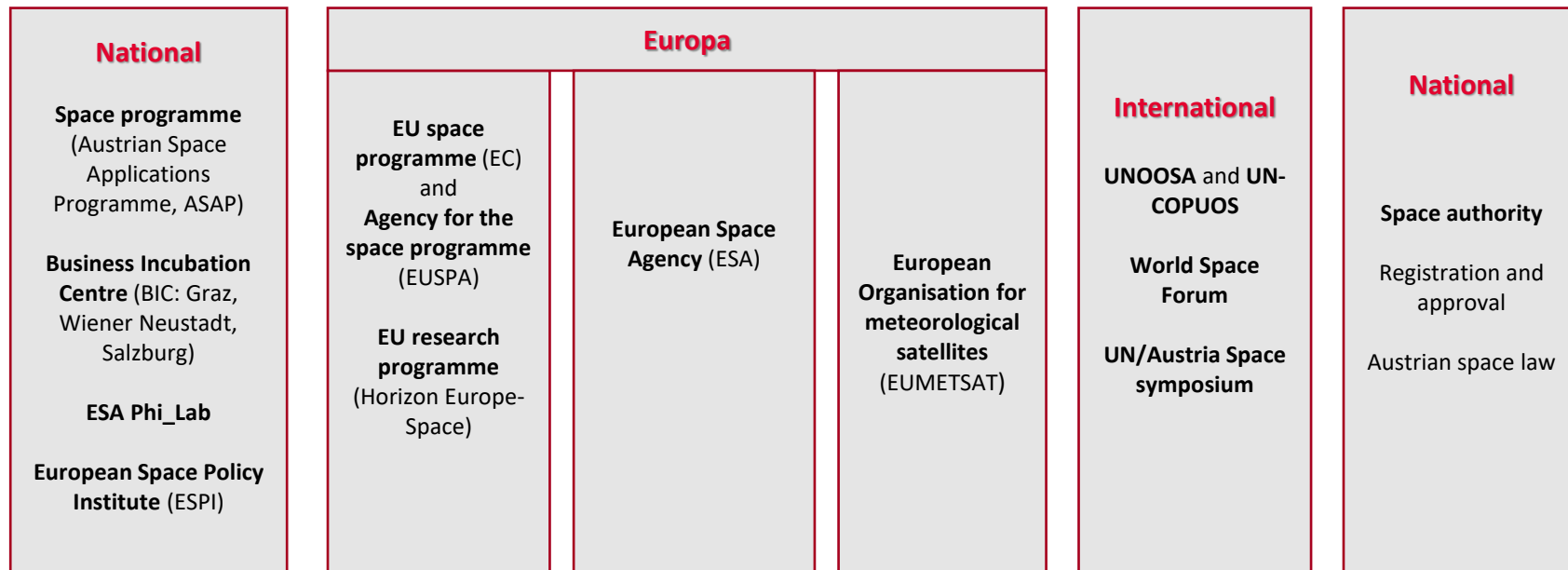
FFG Agentur für Luft- und Raumfahrt

SPACE INDUSTRY IN AUSTRIA OVERVIEW, CURRENT STRATEGIES & BUSINESS OPPORTUNITIES

27th May 2025

CONGRATULATIONS: SMALL ON EARTH, BIG IN SPACE, GALACTIC IN JOINING ESA





PUBLIC SPACE STRATEGIES IN AUSTRIA



2012



2021

Republic of Austria

Austrian Security Strategy

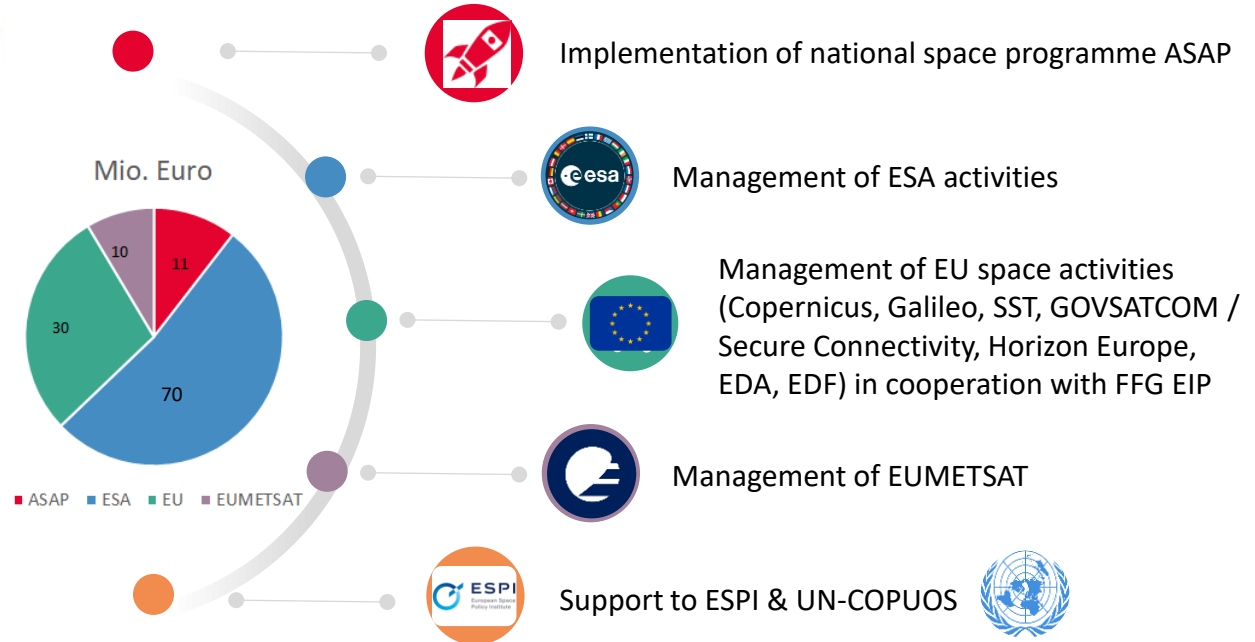
2024



2023

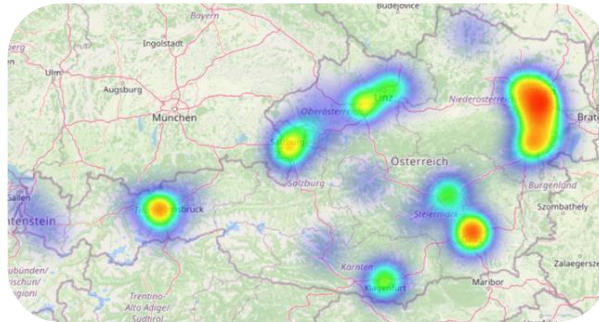


FFG SPACE AGENCY

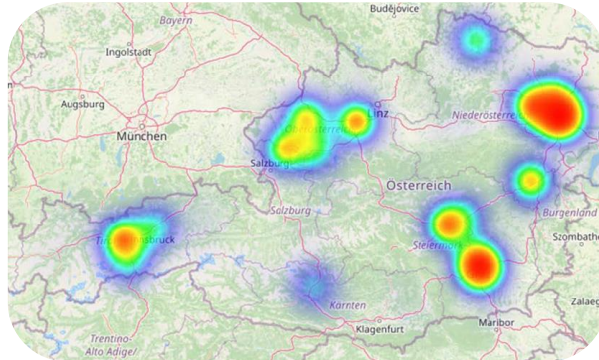


„HEATMAP“ OF AUSTRIAN SPACE ACTIVITIES 2022

NUMBER OF ACTORS
INCOME / BUDGETS



Companies and R&D
institutions:
min. **150**



Income:
min. **209 Mio. €**

Employees:
min. **1300**



beyond gravity



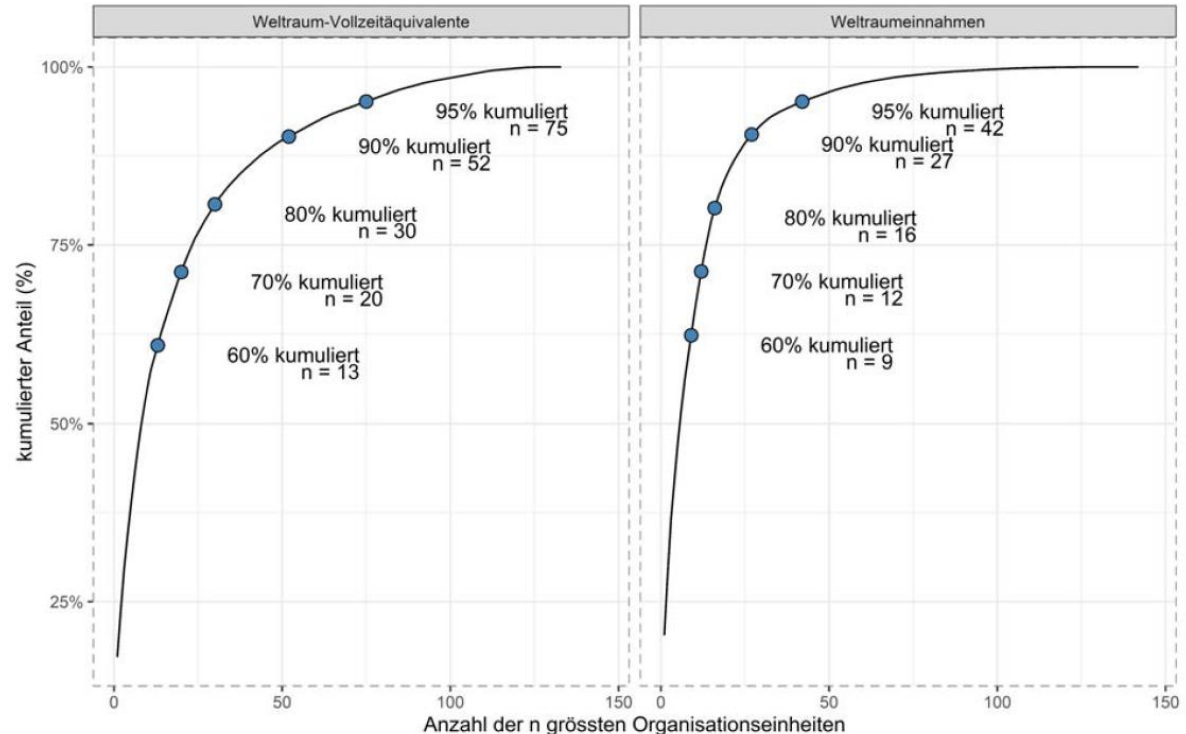
UPSTREAM ACTORS

DOWN STREAM ACTORS

MAIN COMPANIES AND STRATEGIES: AUSTROSPACE

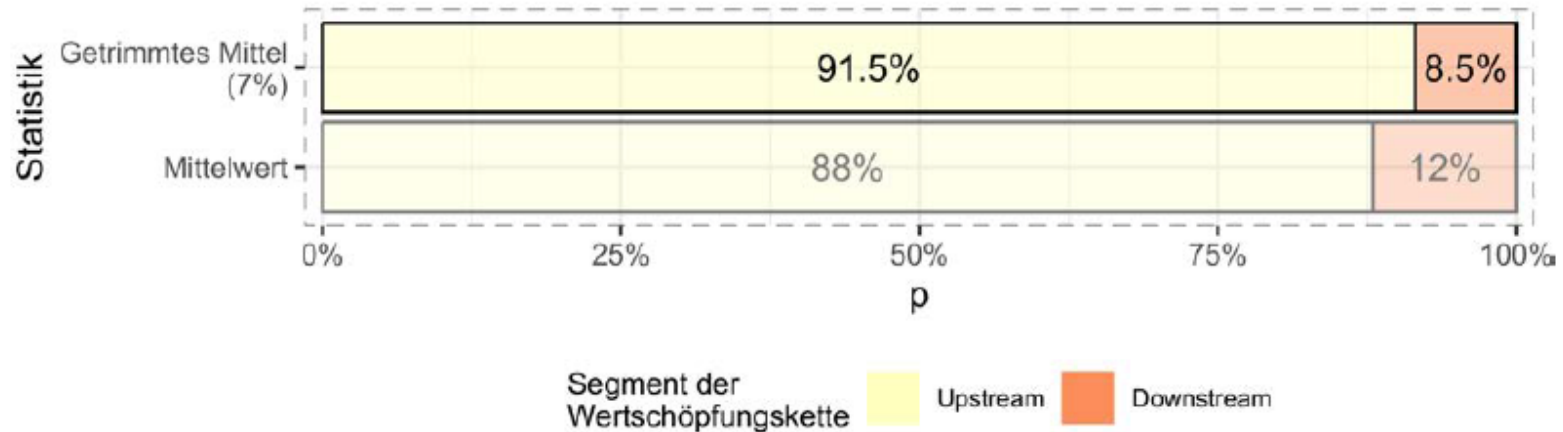


Abbildung I: Kumulierte Weltraum-Einnahmen und Weltraum-VZÄ



INCOME DISTRIBUTION UP/DOWNSTREAM

Abbildung 23: Prozentuale Verteilung der Weltraumeinnahmen nach Upstream und Downstream in der Wertschöpfungskette (klassische und robuste Schätzung)

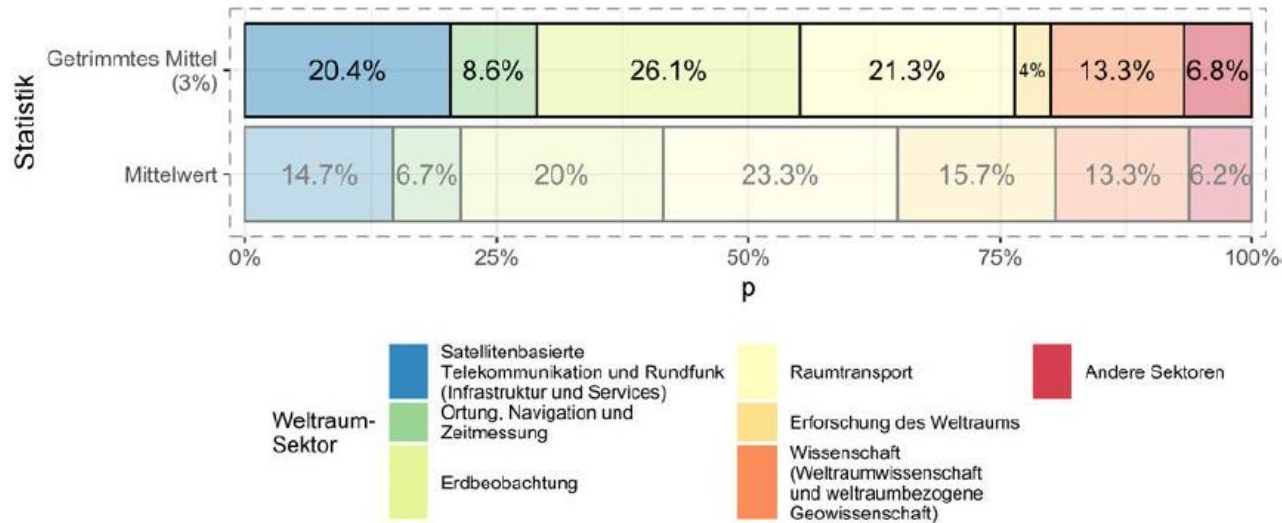


Nur Faktorstufen mit mindestens 5 Weltraumeinnahmen grösser Null dargestellt

Quelle: Eigene Darstellung FHNW

INCOME DISTRIBUTION OF SECTOR IN AUSTRIA 2022

Abbildung 29: Prozentuale Verteilung der Weltraumeinnahmen nach Teilsektoren (klassische und robuste Schätzung)

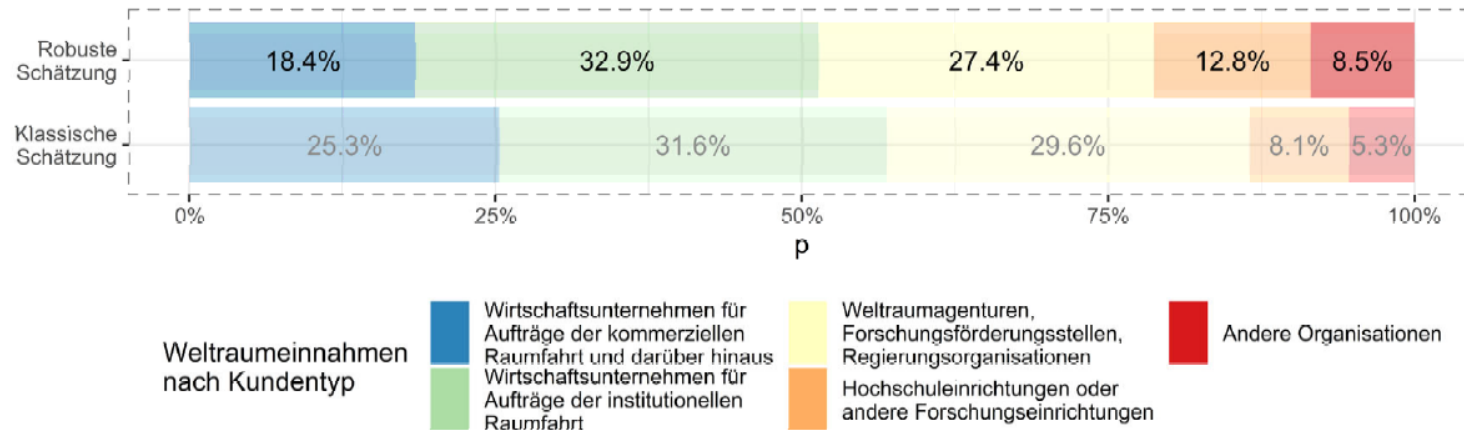


Nur Faktorstufen mit mindestens 5 Weltraumeinnahmen grösser Null dargestellt

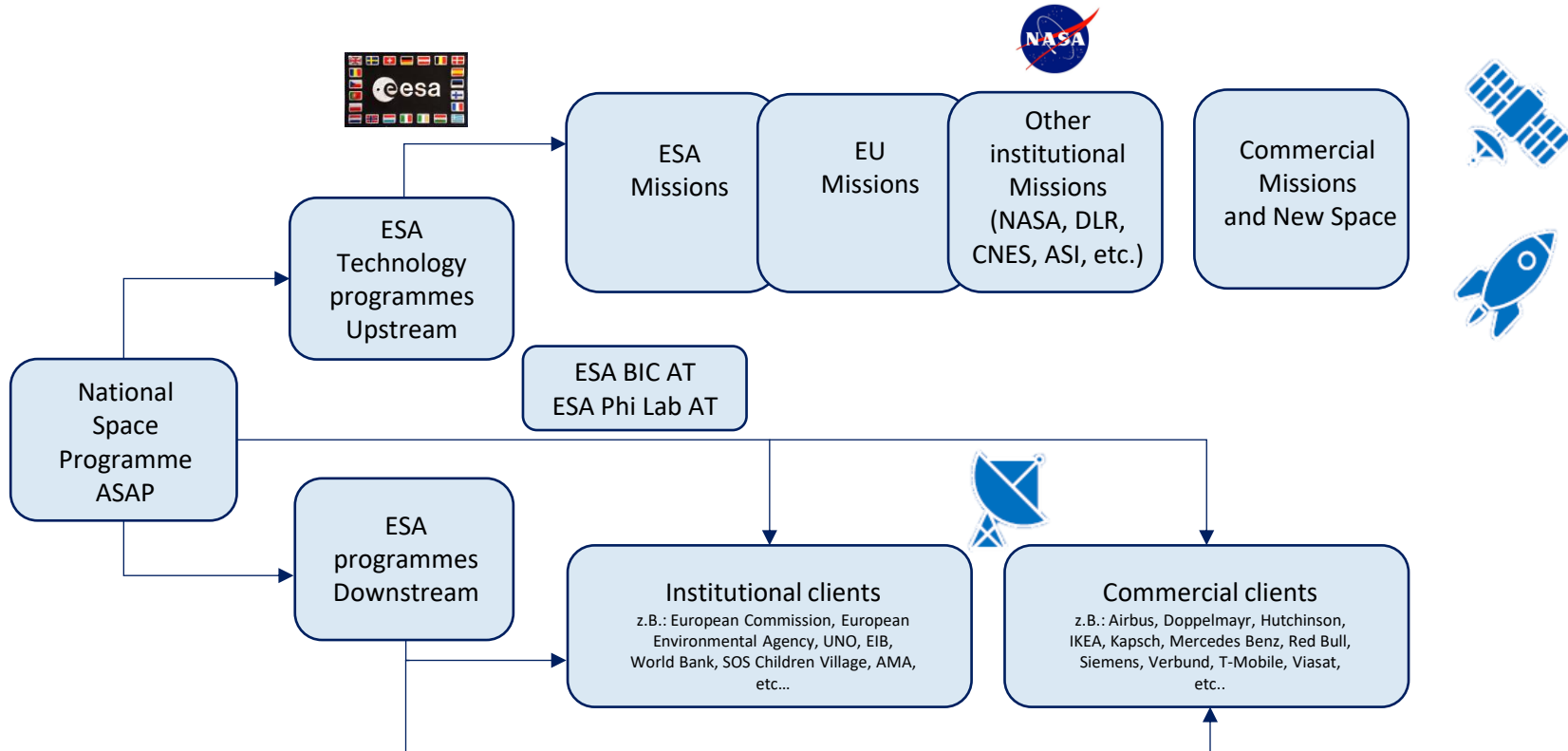
Quelle: Eigene Darstellung FHNW

INCOME DISTRIBUTION ACCORDING TO CUSTOMER TYPE

Abbildung III: Prozentuale Verteilung der Weltraumeinnahmen nach Kundentyp (klassische und robuste Schätzung^{a)})



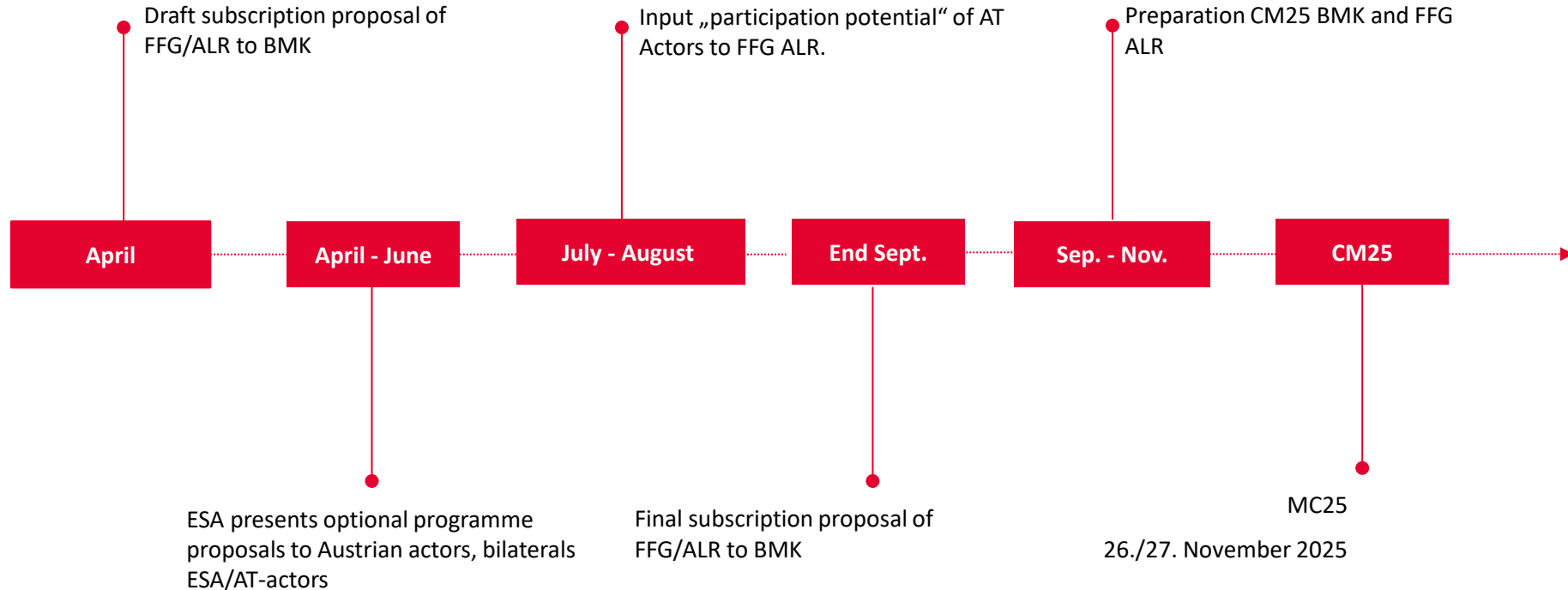
INDUSTRIAL STRATEGIES 1



INDUSTRIAL STRATEGIES II

- Activity/opportunity based: Qualify for ESA and take part in ESA activities and missions
- Activity/opportunity based: Qualify for ESA and take part in ESA activities and missions, leverage into EU space programme und commercial space activities
- Additional service based: add service business to HW products, utilize new-space capabilities
- (Strictly) product based: develop (modular) product (family), qualify via ESA programmes and sell wherever you can, especially US space programmes and commercially
- Services: maintain steady stream of technology and product developments/updates via national programmes and ESA and compete on national, European and global institutional and commercial markets
- Widen core terrestrial business with distinct space niche products

PREPARATION OF ESA MINISTERIAL CONFERENCE 2025 IN AUSTRIA

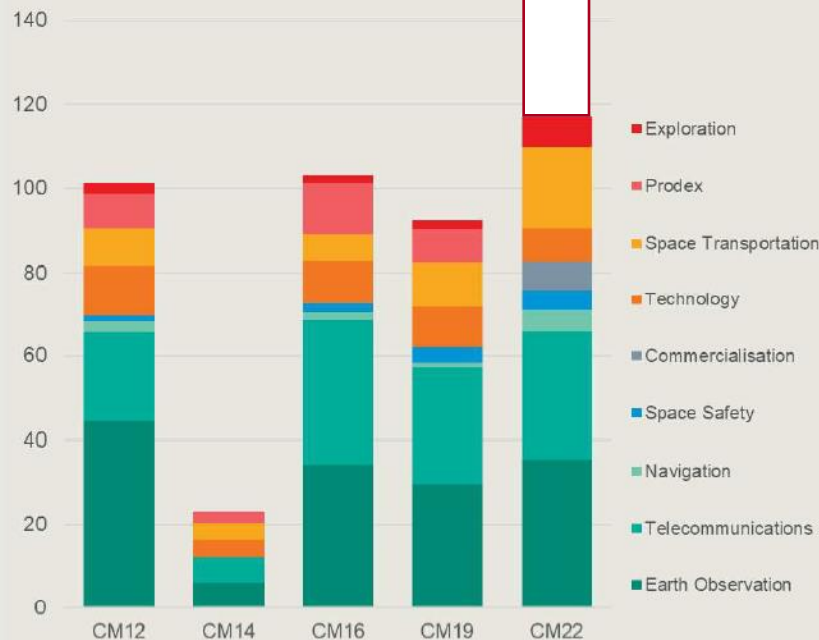


ESA CM Subscriptions

2012	2014	2016	2019	2022
189M€	23M€	194M€	190M€	229M€

Subscriptions to Optional Programmes

259M€



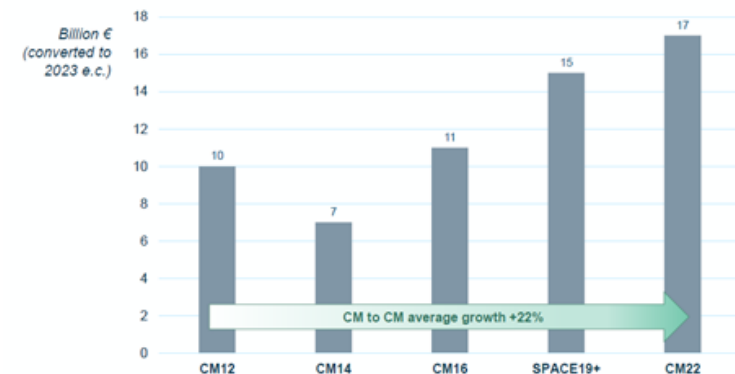
GDP (Source: Eurostat, ESPI, ECB exchange rate)

National Space Expenditure (Source: Euroconsult, ESA; EUMETSAT)

ESA Contributions & Subscriptions (Source: ESA, ESPI)

(The figures are presented in mixed economic conditions: economic conditions of the Ministerial year or current economic conditions when applicable)

Subscriptions at recent CMs

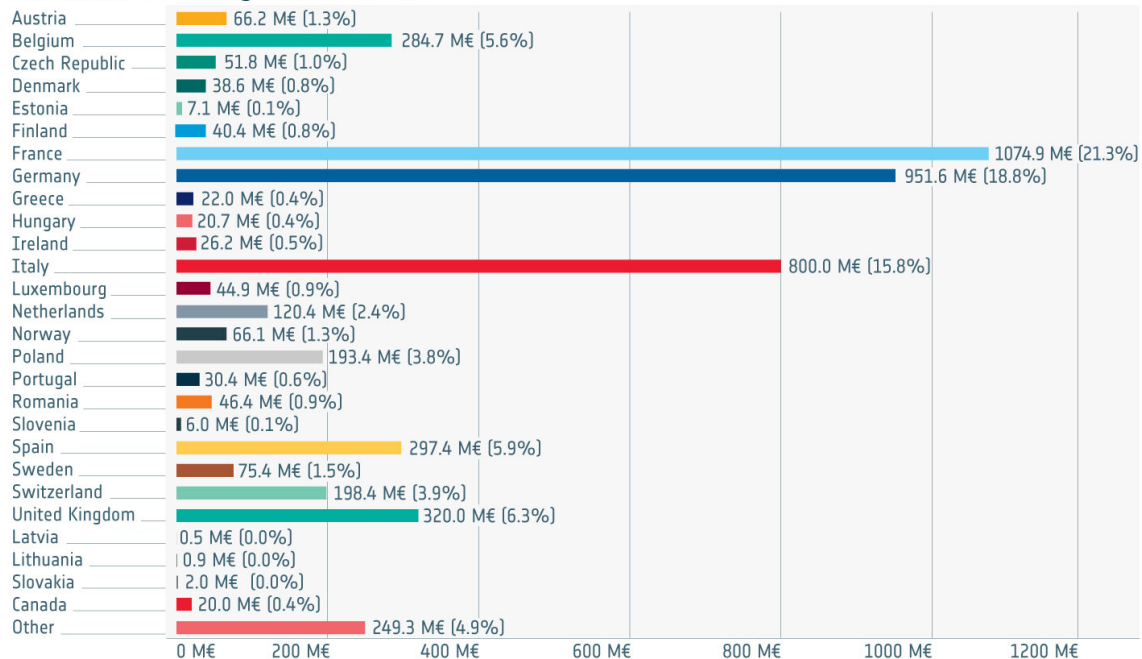


ESA BUDGET 2025



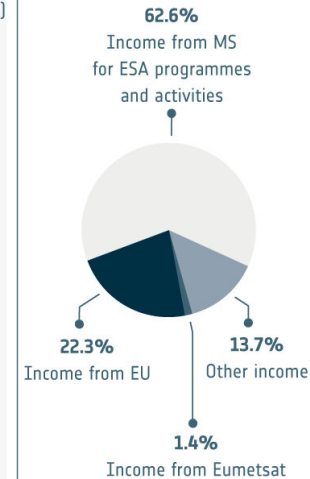
ADOPTED BUDGET 2025: 7.68 B€ TOTAL

ESA Activities and Programmes: 5.06 B€



BUDGET 2025 BY FUNDING SOURCE

TOTAL: 7.68 B€



Austrian Research Promotion Agency

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THANK YOU!