



SPACE2CONNECT CONFERENCE

SHAPING THE FUTURE
TOGETHER



AMBITIONS

SESSION 2

How can we leverage space exploration and international collaboration to enable connectivity and economic growth on Earth and beyond?

DAY 1

WEDNESDAY 7th JUNE 2023

AMBITIONS

SESSION 2

BRINGING CONNECTIVITY TO THE MOON AND BEYOND



Unifying forces to expand connectivity beyond Earth



MODERATOR

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Head of Programme
Directorate, ASI

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SESSION 2

BRINGING CONNECTIVITY TO THE MOON AND BEYOND



Moon market projection through decade



SPEAKER

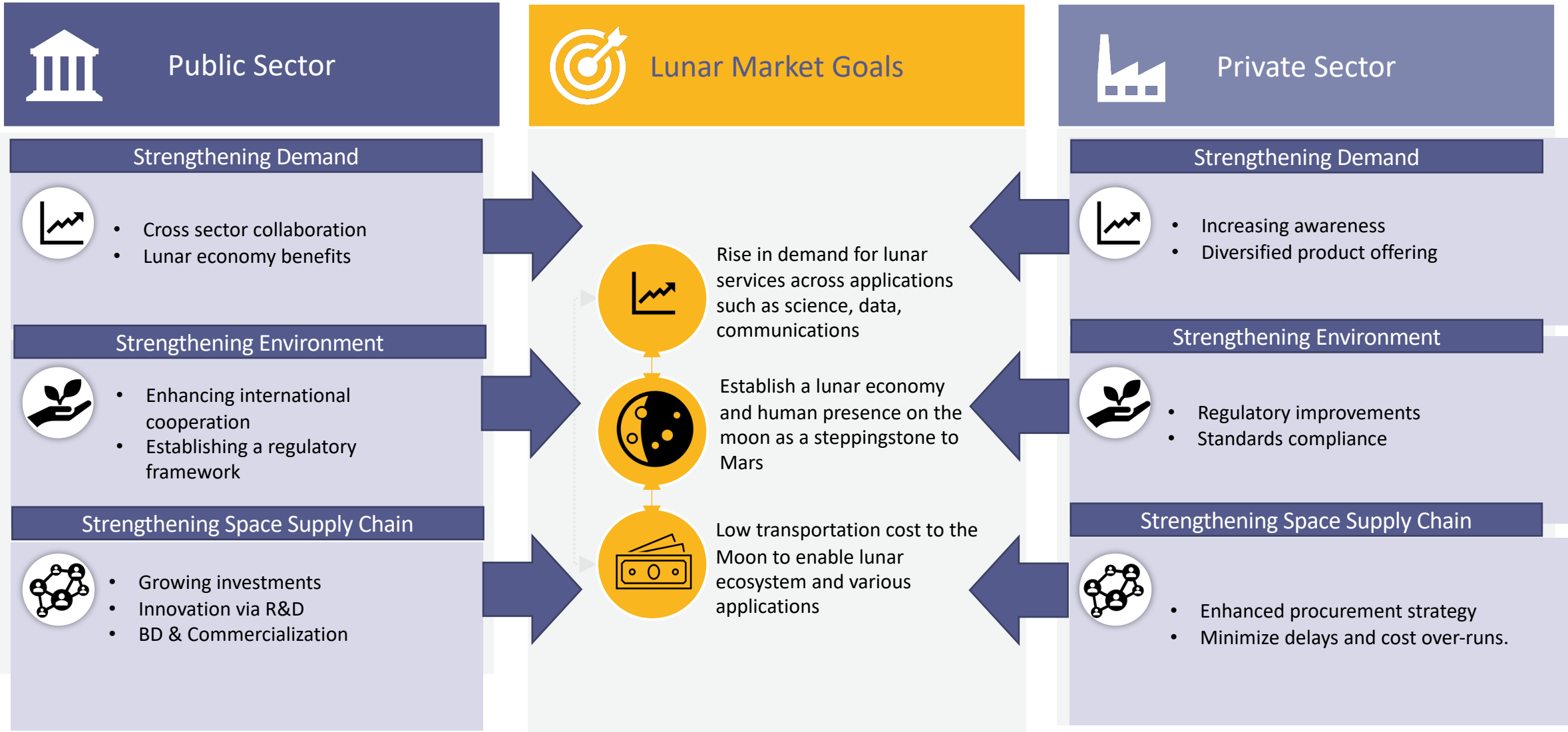
Hussain Bokhari

Senior Analyst, Northern Sky Research
(an Analysys Mason Company)



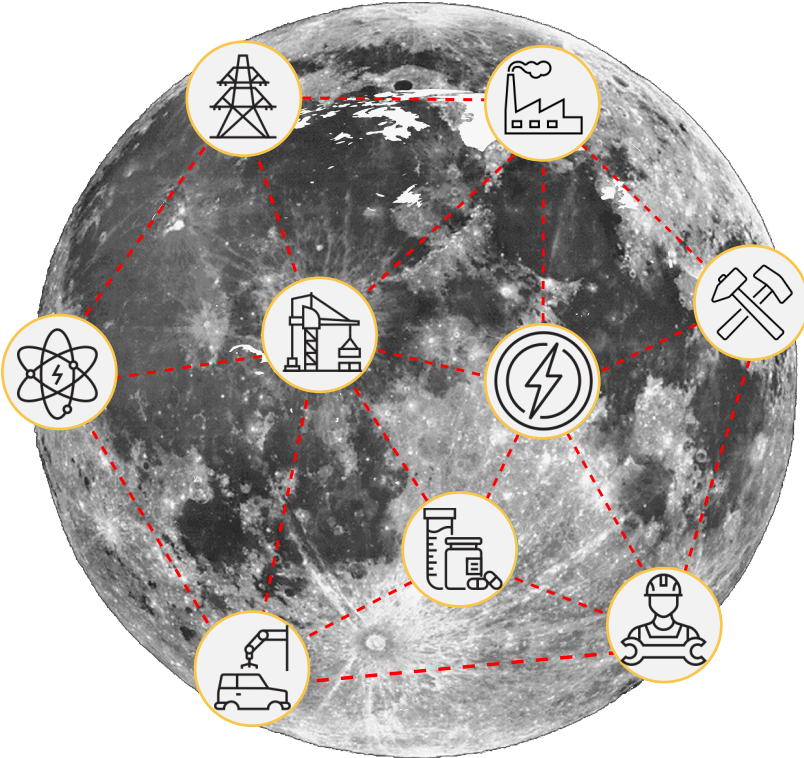
ESA Space2Connect Conference

June 2023



Source: NSR

NASA

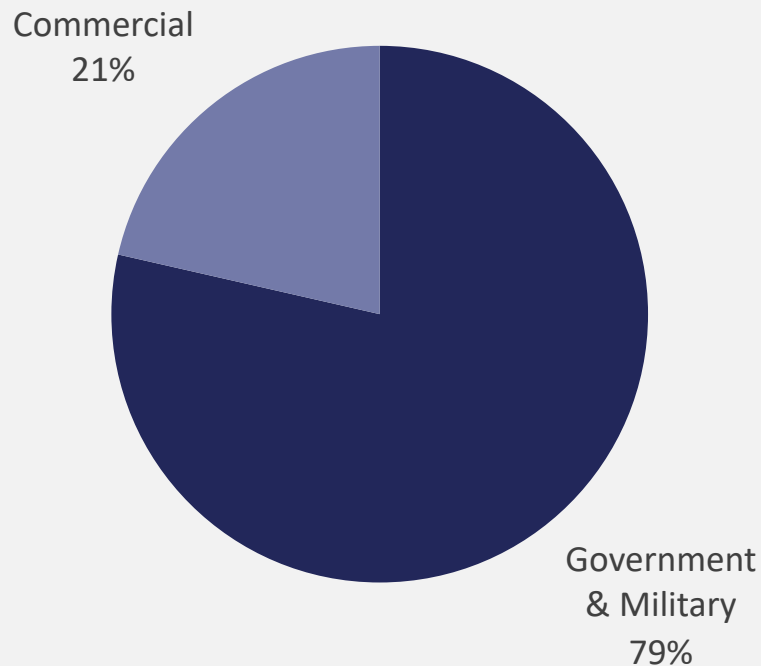




USA		UK	France	Italy-France	Japan	Sweden	Norway	Canada	China	Belgium	Lunar Orbit & Infrastructure	
Astrobotic Technology Inc.	CLPS	Goonhilly Earth Station										Nokia
Deep Space Systems	CLPS	Surrey Satellite Ltd									E3P	Blue Canyon Technologies
Firefly Aerospace	CLPS	Spacebit									E3P	ICON Build
Intuitive Machines	CLPS	Airbus S.A.S									HLS E3P	PH Matter
Lockheed Martin Space	CLPS HLS	Ariane Group									E3P	Resilient Extra-Terrestrial Habitats Institute
Orbit Beyond	CLPS	Thales Alenia Space									E3P	Alpha Space Test and Research Alliance
Blue Origin	CLPS HLS	Toyota										SSL Robotics
Ceres Robotics	CLPS HLS	iSpace, Inc.										Teledyne Energy Systems
Sierra Space Corporation	CLPS HLS	Swedish Space Corporation										Outward Technologies
SpaceX	CLPS HLS	KSAT										
Tyvak Nano-Satellite Systems	CLPS	MDA										
Rocket Lab	CLPS	Ispace China										
Lunar Outpost		Space Applications Services										

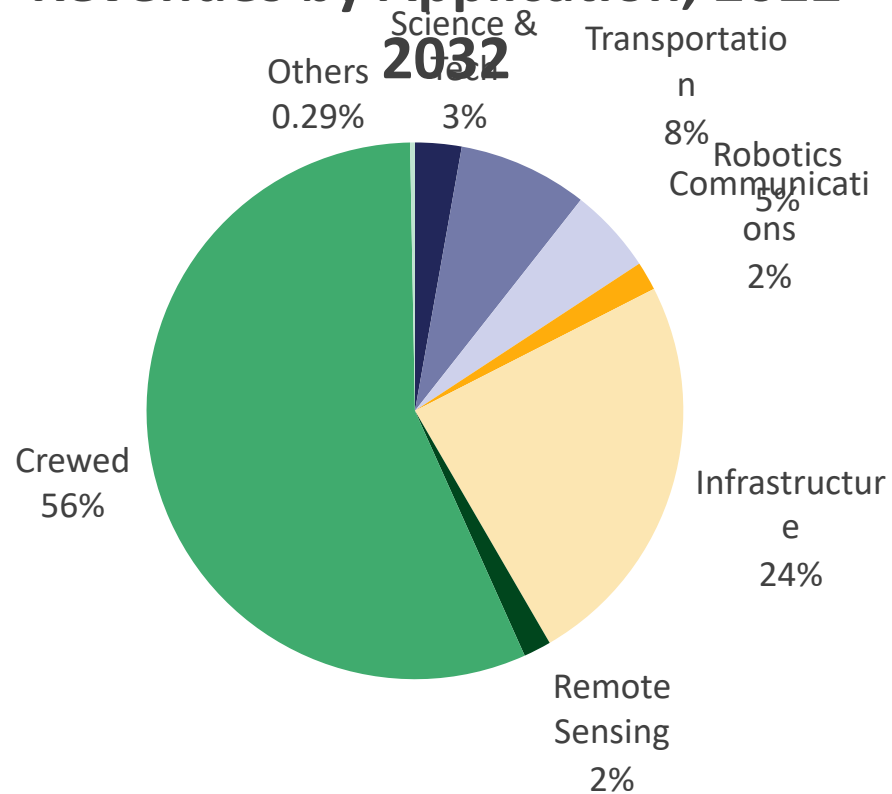


Global Cumulative Lunar Missions Revenue by Operator, 2022-2032



Source: NSR

Global Cumulative Lunar Market Revenues by Application, 2022-2032



Source: NSR

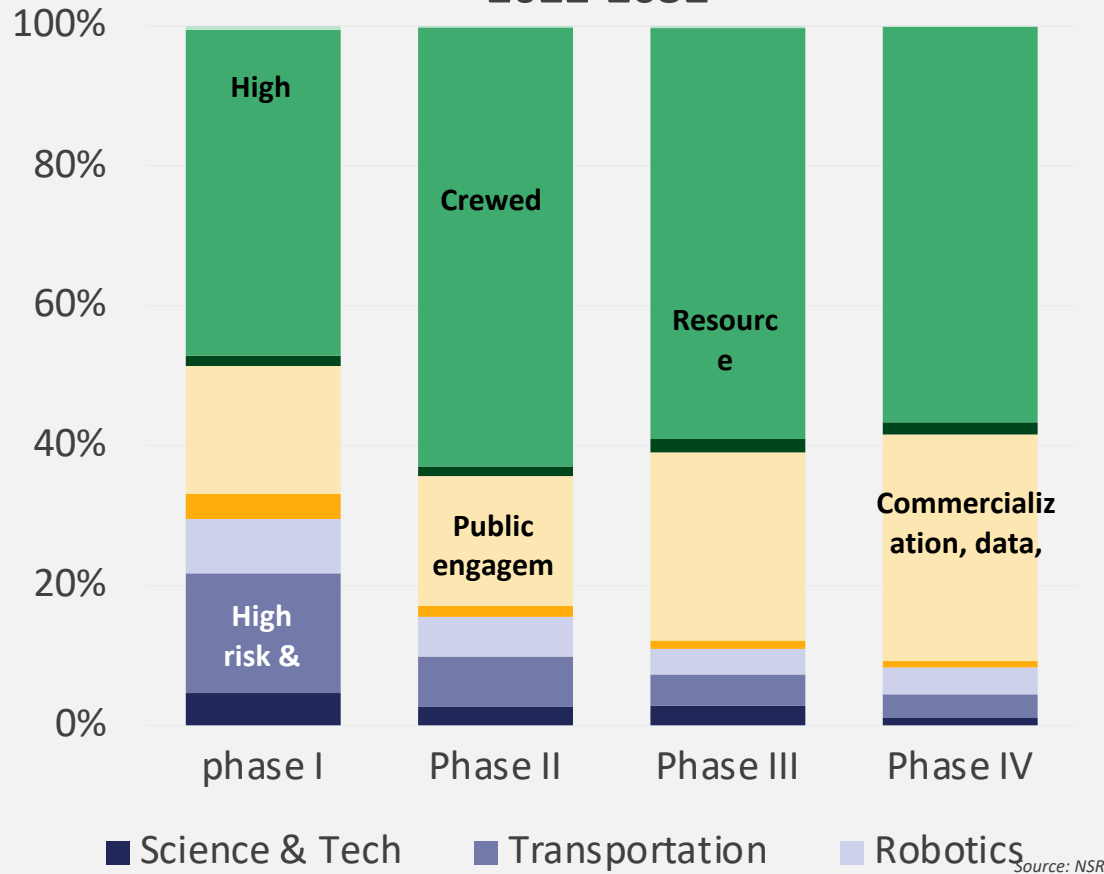
Lunar market is driven by **government budget (79%)** and set to generate **\$136.7B in cumulative revenues** by 2032

International collaboration increase adds **non-space industries to the fold.**

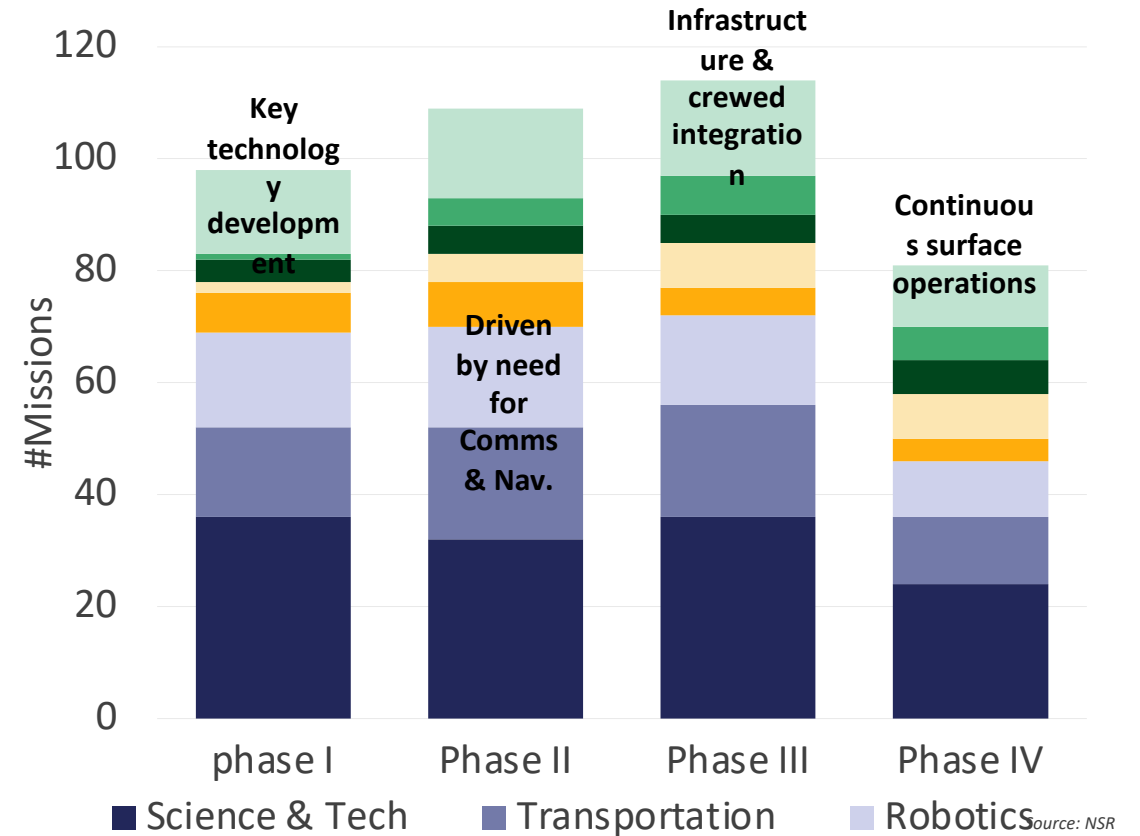
Artemis 1's successful launch, and significant/expanded investment from Accord signatories leading to higher confidence



Cumulative Lunar Revenues by Phases, 2022-2032



Cumulative Lunar Mission by Phases, 2022-2032



Crewed missions are central to the growth of the lunar market (Artemis vs. ILRS)



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