



Wednesday, November 19, 2025

Global Space Summit

Deutsche Bank



Agenda

Deutsche Bank Center - One Columbus Circle (Enter via 58 Street entrance), New York, NY 10019

Time	Events	Location
7:30 am	Conference Registration & Breakfast	Coliseum Foyer, 10 th Floor
8:00 am – 5:00 pm	One-on-One Meetings	9 th , 10 th , 11 th Floors

Time	Panels	Location
9:00 – 9:45 am	Launch Jason Kim, CEO, Firefly Aerospace Eric Romo, President & COO, Impulse Space Adam Spice, CFO, Rocket Lab <i>Moderated by Edison Yu, Director, Deutsche Bank</i>	<i>Bridges Suite</i>
10:00 – 10:45 am	Beyond Earth Tejpal Bhatia, CEO, Axiom Space Peter McGrath, CFO, Intuitive Machines Max Haot, CEO, Vast Matt Kuta, Co-Founder & President, Voyager Technologies <i>Moderated by Edison Yu, Director, Deutsche Bank</i>	<i>Bridges Suite</i>
11:00 – 11:45 am	Buses and Payloads Chris Johnson, CEO, Maxar Space Systems Fredrik Gustavsson, CFO, Swissto12 Dirk Wallinger, President & CEO, York Space Systems <i>Moderated by Edison Yu, Director, Deutsche Bank</i>	<i>Bridges Suite</i>
12:00 – 1:30 pm	Lunch Panel: Outlook for Space Investment Tony Kim, Managing Director, Fundamental Equity, BlackRock Shahin Farshchi, Partner, Lux Capital <i>Moderated by Edison Yu, Director, Deutsche Bank</i>	<i>Coliseum Suite</i>
2:00 – 2:45 pm	Geospatial Intelligence & AI Brian O'Toole, CEO, BlackSky Technology Theresa Condor, CEO, Spire Global <i>Moderated by Edison Yu, Director, Deutsche Bank</i>	<i>Bridges Suite</i>
3:00 – 3:45 pm	Space & Defense Tech John Serafini, CEO, HawkEye 360 Tony Frazier, CEO, LeoLabs GP Sandhoo, Deputy Director, Space Development Agency Even Rogers, CEO, True Anomaly <i>Moderated by Scott Deuschle, Director, Deutsche Bank</i>	<i>Bridges Suite</i>
4:00 – 4:45 pm	Direct-to-Device Connectivity Scott Wisniewski, President & CSO, AST SpaceMobile Vincent O'Neill, CFO, Iridium <i>Moderated by Bryan Kraft, Director, Deutsche Bank</i>	<i>Bridges Suite</i>

Time	Event	Location
5:00 – 6:00 pm	Cocktail Reception	<i>Der Bulle, 10th Floor</i>



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Panel descriptions

Time	Event
Launch 9:00-9:45am	Developing a reliable rocket is very difficult and a shortage could persist for several years, exacerbated by the need for sovereign redundancy and hypersonic missile testing, supporting robust pricing dynamics for those with leading capabilities. Demand from both governments and commercial operators is increasing, and DB estimates the global launch TAM to be worth ~\$13bn this year, growing to >\$30bn in 2030E.
Beyond Earth 10:00-10:45am	Beyond Earth has come to represent a variety of activities in Space, including exploration (Moon and Mars), habitats (ISS replacement), debris removal, and situational awareness. With broad support from US policy, we expect private companies to increasingly take over development from government agencies, leading to shorter lead times and greater efficiency. Looking at the lunar exploration market alone, DB forecasts a Blue Sky TAM of >\$10bn by 2030 and \$15bn in 2035.
Buses and Payloads 11:00-11:45am	The satellite bus and payload market is experiencing strong, consistent growth, driven by increasing demand for satellite-based services in telecommunications, Earth observation and defense & intelligence. The market is expected to expand annually over the next decade, reaching an estimated TAM of ~\$109bn by 2033 (bus market size: ~\$74bn; payload market size: ~\$35bn). Standardization of buses and consolidation of smaller payload suppliers will likely be key themes this year.
Lunch Panel: Outlook for Space Investment 12:00-1:30pm	This panel brings together investors from various stages of growth in a company's lifecycle, from early-stage VC investors to growth PEs to public institutional investors. Panel speakers will provide their views on the uniqueness of investing in the Space sector, and how they considered strategic and financial merits in their investment decisions.
Geospatial Intelligence & AI 2:00-2:45pm	Earth observation capabilities are proliferating globally with multiple countries now leveraging commercial satellites for their sovereign needs and gaining access to high resolution + high revisit rate capabilities. This represents a multi-billion dollar TAM and longer term, advancements in end-to-end AI can supercharge adoption especially in commercial end-markets by making it easier / faster to derive actionable insights (e.g., ingesting data through LLM).
Space & Defense Tech 3:00-3:45pm	Space plays a critical role in defense and security, providing key backbone services everyday such as GPS / comms and the domain itself seems to be getting more militarized with adversaries. Increasingly, the commercial sector is developing capabilities, services and innovative technology that can support DoD / Space Force (e.g., SDA, Golden Dome). A competitive selling point is that private capital can allocate resources to invest ahead of need, and therefore deliver the capability to DoD coincident with that actual need so that the US can stay a step ahead of rival nations.
Direct-to-Device Connectivity 4:00-4:45pm	Due to the growing interest in providing connectivity by satellites directly to smartphones, the D2D market has become an exciting area in the Space industry involving the largest entities in both traditional telecom and next-gen satcom. As technology continues to advance, particularly with regard to data and voice, a dynamic market could emerge that will optimize affordability and service quality. As new offerings come online, we expect a lively debate on the best approaches amongst participants regarding spectrum, market size, business model, ARPU, and much more.



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Attending companies

Public companies

AST SpaceMobile
Astroscale
Avio
BlackSky Technology
C-Com Satellite Systems
EchoStar Corp
Firefly Aerospace
Gilat Satellite Networks
GomSpace
ImageSat International
Intellian Technologies
Intuitive Machines
Iridium Communications
ispace
MDA Space
Ovzon
Planet Labs
Redwire
Rocket Lab
SES
Space42
Spire Global
Telesat
Voyager Technologies

Private companies

Blue Origin
Anduril Industries
Maxar Space Systems
Axiom Space
Impulse Space
York Space Systems
HawkEye 360
Ursa Major Technologies
Stoke Space Technologies
True Anomaly
CesiumAstro
Lynk Global
Fleet Space Technologies
X-Bow Systems
Vast Space
LeoLabs
Swisst012
Aalyria
Aerospacelab
Agile Space Industries
All.Space Networks
Antaris
Arkisys
Astrolab
Atlas AI
Auriga Space
Cailabs
EarthDaily Analytics
EnduroSat
Epsilon3

Equatorial Space
eSAT Global
ETA Space
Exolaunch
Exotrail
GHGSat
Globalsat
HEO Space
HStar Space
Hubble Network
Integrate Space
iSEE
Kepler Communications
KinetX
Little Place Labs
Lonestar Data Holdings
Lunar Outpost
Manga Petra
Mangata Networks
mPower Technology
mu Space Corp
Muon Space
Myriota
OffWorld
Omnispace
Open Cosmos
Phantom Space Corp
Phasetrum
PLD Space

Portal Space Systems
Privateer
Radian Aerospace
Ramon.Space
RS Metrics
Samara Aerospace
SAT4M2M
SatVu
Scout Space
Seer AI
Source Energy
Space Development Agency
SpaceRake
Star Catcher
Starfish Space
ST Engineering iDirect
The Extraterrestrial Mining Company
Tomorrow.io
Turion Space
Ursa Space Systems
Volta Space Technologies
World View Enterprises