

The Commercial Hiring Index

Europe's space sector lists eight engineering vacancies for every commercial one.

Hugo van de Haar · The Demand Side · July 2026 · **DRAFT, pending final author pass**

Abstract. Job postings are costed intentions: a press release about commercialisation is free, a salary line for a business developer is a bet. This note visits the public job boards of 48 European space companies, of which 44 could be counted, classified on 17 July 2026, and introduces the Commercial Hiring Index (CHI): the commercial share of open roles, recomputed quarterly on a fixed company list. The Q3 2026 baseline, across those 44 countable companies and 622 open positions, is 8.7 percent, or 8.4 engineering vacancies for every commercial one. Commercial hiring is nearly absent where hardware is hardest (launch 2.8 percent, in-orbit servicing 2.4 percent, propulsion 3.9 percent), rises where a sellable product exists (satellite manufacturers 14.7 percent, satcom IoT operators 35 percent), and, where it exists at all, points overwhelmingly at government and defence buyers. The hiring data mirrors a demand structure ESA itself has quantified, roughly 80 percent institutional in the upstream market against a largely commercial downstream (ESA, 2026), and may be reproducing it. All figures were independently re-added and spot-checked against live job boards before publication; residual uncertainties are reported in section 7.

Keywords: space economy; demand gap; commercialisation; labour-market indicators; hiring; Europe.

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1. Why count job postings

Every European space company says commercialisation is a priority. Strategies, conference panels and pitch decks agree. Priorities, however, stop being free at the job board: hiring is the moment a company converts its stated future into salary commitments, headcount plans and onboarding capacity. Aggregated across a sector, open positions reveal what companies collectively expect their next problem to be.

This note asks a simple question of European space in mid-2026: *who is the sector paying to show up next Monday, builders or sellers?* The answer matters because the sector's own story is one of commercial transition. European space ventures attracted 1.4 billion euros of private investment in 2025, 8 percent below the previous year, with venture capital specifically growing 13 percent to 1.2 billion (ESPI, *Space Venture 2025*), and nearly every funding announcement promises a commercial revenue curve. If that

transition is underway, it should be visible in recruitment before it becomes visible in revenue. Job postings are, in that sense, a leading indicator: they precede the salespeople, who precede the pipeline, which precedes the commercial revenue the sector keeps promising.

The inverse also holds, and it is the uncomfortable half of the argument. A sector that does not hire commercial people is not planning commercial revenue, whatever its press releases say. That is worth measuring, repeatedly and consistently. Hence an index.

2. The model: Commercial Hiring Index

The Commercial Hiring Index is deliberately simple. Take every open position a company lists publicly. Classify each role by its title against a fixed rubric:

Table 1. *Classification rubric*

Class	Definition
ENG	All technical roles: engineering, software, hardware, avionics, propulsion, test, AIT, manufacturing, R&D, data science
COM	Sales, business development, marketing, communications, account management, customer success, partnerships, bids and proposals
OPS	Finance, HR, legal, administration, supply chain, procurement, IT support, facilities
UNCLEAR	Titles that resist honest classification (general management, programme managers without technical markers); reported, never guessed

CHI = commercial openings as a share of total openings, computable per company, per segment and for the sector. The companion metric is the engineer-to-commercial ratio (E:C), read as engineering vacancies per commercial vacancy, not as all other roles per commercial role. Counting rules, fixed in advance:

Table 2. *Counting rules, fixed before collection*

Rule	Application
Talent pools excluded	Open applications, “talented individuals” and evergreen pipeline advertisements do not count as openings
Titles decide	“Technical Sales Engineer” and “Presales Engineer” are COM (sales function); “Communications Systems Engineer” is ENG (RF, not marcomms)
Bids are commercial	Bid, proposal and capture roles are COM: in an institutional market, they are the sales force
Per-posting counting	Multi-city postings with distinct ATS identifiers count per posting; noted as a limitation
Doubt is reported	Ambiguous titles go to UNCLEAR rather than being forced into a class

No external calibration is offered here. There is no published benchmark for the commercial share of open roles in comparable B2B sectors that this note is prepared to cite, so CHI is read against itself: seg-

ment against segment, company against company, and from Q4 2026 onwards quarter against quarter. Section 4 shows the internal spread, which is wide enough to be informative on its own.

3. Sample and method

The sample comprises 48 European space companies drawn from the author's 50-company website dataset (July 2026), selected for spread across segments and countries: launch, Earth observation, SSA and space traffic management, in-orbit services, propulsion, satellite manufacturing and components, satcom IoT, and ground and downstream data. All counts were taken on 17 July 2026 from public careers pages and applicant tracking systems (Greenhouse, Lever, Personio, Teamtailor, Workable, Recuitee and comparable). Four of the 48 could not be counted because their boards render only with JavaScript: PLD Space, ICEYE, Neuraspace and KSAT. Every figure in this note therefore rests on 44 countable companies, not on 48. Every counted position was recorded; every commercial title was recorded verbatim as evidence. The full company table is Appendix A; commercial titles are Appendix B.

Table 3. *Sample composition and segment-level CHI*

Segment	Companies (countable)	Open roles	COM roles	Segment CHI
Launch	6	180	5	2.8%
In-orbit services, logistics and cargo	5	83	2	2.4%
Propulsion	6	76	3	3.9%
SSA and space traffic management	5	22	1	4.5%
Satellite manufacturers and components	6	116	17	14.7%
Earth observation and EO analytics	9	34	11	32.4%
Satcom IoT	3	17	6	35.3%
Ground and downstream data	4	94	9	9.6%
Total	44	622	54	8.7%

4. Results

4.1 The baseline

Table 4. *Q3 2026 baseline, verified totals*

Sample	Companies	Open roles	ENG	COM	OPS	Unclear	CHI	E:C
Total (verified)	44 of 48	622	452 (72.7%)	54 (8.7%)	86 (13.8%)	30 (4.8%)	8.7%	8.4 : 1

Sample	Companies	Open roles	ENG	COM	OPS	Unclear	CHI	E:C
Batch A: launch / EO / SSA / in-orbit	21	244	183	17	37	7	7.0%	10.8 : 1
Batch B: propulsion / components / satcom / downstream	23	378	269	37	49	23	9.8%	7.3 : 1

4.2 The ten largest job boards

Ten companies account for 423 of the 622 openings (68 percent). Their commercial shares tell the story in miniature:

Table 5. *The ten largest job boards, 68 percent of all openings*

Company	Segment	Open roles	COM	Company CHI
Isar Aerospace	Launch	94	3	3.2%
Open Cosmos	Missions / downstream data	65	4	6.2%
EnduroSat	Satellite manufacturer	55	8	14.5%
Infinite Orbits	In-orbit servicing	45	1	2.2%
Rocket Factory Augsburg	Launch	43	1	2.3%
Exotrail	Propulsion / mobility	33	1	3.0%
Spire Global (European offices)	Downstream data	25	4	16.0%
GomSpace	Smallsat	23	5	21.7%
ThrustMe	Propulsion	22	2	9.1%
Reflex Aerospace	Satellite manufacturer	18	0	0.0%

4.3 Where the commercial hiring actually is

Eleven of 44 countable companies have two or more commercial openings. Ranked by commercial share (companies with at least five total openings):

Table 6. *Companies with two or more commercial openings, ranked by commercial share*

Company	Open roles	COM	Company CHI	Character of the commercial roles
LiveEO	12	7	58%	Account executives, BD managers (two of three government programmes), BDR, Head of Customer Success
OQ Technology	9	3	33%	Proposal manager; sales and BD managers for Australia and Saudi Arabia
Sateliot	5	2	40%	Two junior sales development representatives

Company	Open roles	COM	Company CHI	Character of the commercial roles
AAC Clyde Space	7	2	29%	BD and sales manager; Head of Business Development UK, Sweden, Netherlands
GomSpace	23	5	22%	Senior BD Director Defence; Offset BD Director; project capture; partnerships; commercial operations
Spire Global (EU)	25	4	16%	Weather and climate sales, sales engineer, digital marketing, content
EnduroSat	55	8	15%	Eight BD managers across seven cities, four of them in the United States; government-sector roles in Berlin and Munich

Two patterns stand out. First, the leaders sell data, connectivity or a standard product; none of them sells a rocket. Second, the commercial titles wear a uniform: government programmes at LiveEO, a defence director and an offset director at GomSpace, government-sector BD at EnduroSat, sovereign-flavoured satellite sales throughout. A third detail is worth noting for what it says about where European demand is thought to be: four of EnduroSat's eight business-development postings are in the United States, in Washington DC, Los Angeles and Denver. The 2026 commercial job description in European space is, to a first approximation, a government or defence sales job. Demand follows the budgets; the budgets are institutional.

4.4 The zero end of the distribution

Seven of 44 countable companies list no openings at all: Skyrora (which states on its careers page that all positions are filled), Morpheus Space, ClearSpace, Kayrros, Prométhée, Aldoria and Mission Space. OroraTech's only two openings are in finance and compliance. Two companies are hiring exclusively engineers: Reflex Aerospace (18 openings) and The Exploration Company (10). Across parts of European EO and SSA, mid-2026 recruitment looks less like growth and more like consolidation.

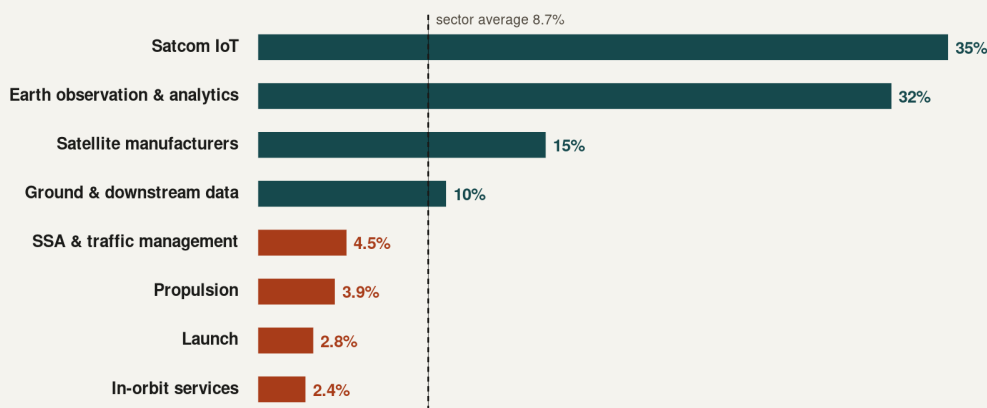
4.5 Five findings

One. On the 44-company panel the Commercial Hiring Index stands at 8.7 percent: 54 commercial openings among 622. For every 8.4 engineering vacancies, European space lists one commercial vacancy, whether salesperson, business developer, marketer or bid professional.

Two. The closer to hardware, the emptier the commercial bench: launch 2.8 percent (180 roles across six launchers, 5 commercial, of which Isar's three are junior or specialist level and none is senior sales; the four launchers with active boards, Isar 94, RFA 43, HyImpulse 14 and Latitude 12, hold 163 of those roles and all 5 commercial ones, 3.1 percent), in-orbit services 2.4 percent, propulsion 3.9 percent (76 roles, 3 commercial). The commercial share rises with proximity to a sellable product: manufacturers with flying hardware 14.7 percent, downstream data 9.6 percent, EO analytics 32 percent, satcom IoT 35 percent.

Who is hiring salespeople in European space? The Demand Side

Commercial share of open positions (CHI), by segment · 622 roles at 44 companies, July 2026



The closer to hardware, the emptier the commercial bench.

Launch, propulsion and in-orbit servicing hire almost no commercial staff; the segments with a sellable product carry the average.

The Commercial Hiring Index · Q3 2026 baseline · reruns quarterly

by Hugo van de Haar · source: company job boards, 17 Jul 2026, verified

Figure 1. Commercial share of open positions by segment, Q3 2026. Hardware segments in orange.

Three. Commercial hiring wears a uniform. Where dedicated commercial roles exist, they overwhelmingly target government and defence demand: EnduroSat's government-sector BD managers, GomSpace's Senior BD Director for Defence and its Offset BD Director, LiveEO's government programmes for Germany and the EU. The pattern this publication keeps finding in revenue statements is now visible in recruitment.

Four. The first-hire pattern. Smaller firms hiring commercially are hiring their first commercial employee, not a team: a lone Marketing Lead at Dcubed, a Head of Customer Success at Leaf Space, two junior SDRs at Sateliot, a communications intern at Kinéis. European space hardware companies are not scaling commercial functions; they are discovering they need one.

Five. A notable share of the sector is not hiring at all, and one signal cuts the other way: Kinéis' main site carries a senior enterprise-sales job description that never reached its ATS board, evidence that some commercial hiring intent exists that boards do not yet show.

4.6 Robustness: a second, wider panel

After the Q3 baseline was fixed, the count was extended to a second panel of 100 European space companies, the 44 quarterly firms plus 56 further ones, 1,109 open roles in total (collected 23 July 2026). On that panel the Commercial Hiring Index is 9.2 percent, or 7.7 engineering vacancies for every commercial one.

These are not revisions of the baseline. The 8.7 percent and the 8.4 to 1 belong to the 44-company panel and its 622 roles; the 9.2 percent and the 7.7 to 1 belong to the 100-company panel and its 1,109 roles. The quarterly index continues on the fixed 44-company list, as the model requires; the wider panel sits beside it as a cross-section. That the two land within half a percentage point of each other on more than double the company base is the point: the baseline is not a small-sample accident. The wider panel also sharpens the defence reading, with bid, capture, institutional and defence-sales titles recurring at

Creotech, Fossa, Cailabs, cosine and Loft Orbital's EMEA business-development team.

5. Three readings of one number

The obvious objection first: of course space companies hire engineers; they build rockets and satellites. The index does not argue otherwise. The question is whether one commercial vacancy per 8.4 engineering vacancies matches the sector's own story about commercial transition. Three readings, from generous to uncomfortable; they are not mutually exclusive.

The generous reading: founder-led sales. Below Series A the founders sell, rightly, and job boards cannot see a CEO doing customer calls. Some zero-commercial companies are simply early. This reading explains the small end of the distribution; it does not explain Isar Aerospace listing 94 roles with no senior commercial position, or Reflex hiring 18 engineers and nobody to sell what they build.

The structural reading: the customer is institutional, so the commercial function is thin by design. Revenue from ESA programmes and national agencies requires bid managers and proposal writers, not a sales floor. The data supports this: bid and capture roles appear steadily, and dedicated sales roles point at governments and defence. On this reading the sector's hiring simply mirrors the structure of its demand, and that structure is one ESA itself has now quantified. Its *Report on the Space Economy 2026* puts institutional demand, dominated by defence, at roughly 80 percent of the upstream market for spacecraft and launch services, while the far larger downstream market for satcom, Earth observation and navigation is largely commercial (ESA, 2026). Almost every company counted here sits upstream. That is consistent, and it is also the point: hiring confirms that the commercial transition has not yet reached the org chart.

The uncomfortable reading: companies build what their funding pays for. Development contracts fund engineers; nobody's grant funds a sales team. The commercial muscle stays unbuilt, which keeps revenue institutional, which keeps the next hiring round technical. On this reading the demand gap is not merely visible in the data; it is being reproduced by it, one job posting at a time.

6. Method notes

Counted on 17 July 2026, in two same-day collection passes that were reconciled against each other, followed by an independent verification pass (section 7). Sources were the companies' own careers pages and applicant tracking systems; LinkedIn was not used. Where a company's marketing site and its ATS disagreed, the ATS was taken as the source of truth. Internships and working-student roles were counted and flagged; six of Latitude's twelve openings and fourteen of RFA's forty-three are internships or apprenticeships, all technical. Companies that rebranded were tracked to their current identity (Pangea Propulsion, formerly Pangea Aerospace; Aldoria, formerly Share My Space, counted separately from Look Up Space).

7. Verification and data quality

Every figure in this note passed a two-stage check before publication. First, all 44 countable company rows were independently re-added, at row level and at file level. Second, six boards spanning the size range were re-fetched and recounted against the live source. Where these checks surfaced discrepancies, the dataset was corrected before any number was published: stale posting URLs were excluded,

eight evergreen talent-pool postings were removed for cross-batch consistency, two of them commercial, and two borderline titles were reclassified from engineering to unclear. The headline is insensitive to every one of these adjustments: the commercial share stands at 8.7 percent under all treatments.

What cannot be fully resolved is reported rather than smoothed over. Job boards move daily; a two-role drift at LiveEO between collection and verification illustrates the pace. One large board (Isar Aerospace, 94 roles) could not be independently re-verified because the source system's own total fluctuated during measurement; the counting method is documented in the workpapers. The largest residual uncertainty is Open Cosmos: its board headers returned totals between 65 and 79 across successive fetches, so up to 12 postings there can be confirmed neither in nor out. In the worst case the panel total rises to roughly 634 roles and the commercial share moves to between 8.5 and 8.7 percent, which does not change the reading.

8. Limitations

This is a snapshot; boards move daily, as the LiveEO drift demonstrates. Titles are a proxy for jobs, not a description of their content. Founder-led selling is invisible to this method: CHI measures the built commercial function, not total commercial effort. Multi-location postings are counted per posting, which inflates totals for EnduroSat, Open Cosmos, OKAPI and Spire.

Europe-filtering is not yet uniform, and not in the direction a reader might assume. Spire and Astroscale, neither of them European-headquartered, were filtered down to their European operations. EnduroSat (Bulgaria) and OQ Technology (Luxembourg) are European companies whose non-European postings could not be cleanly separated, so they were left in: four of EnduroSat's eight commercial roles are in the United States and two of OQ's three are outside Europe. This lifts the European commercial share slightly, and will be standardised in the Q4 run.

Two further caveats cut against the commercial figure rather than for it. At D-Orbit and at Kinéis the sole commercial opening is an internship, which flatters the commercial count. And unclear roles account for 4.8 percent of the 44-company panel and 5.6 percent of the 100-company panel; if commercial roles are hiding in that residue, 8.7 percent is a floor and not a ceiling.

Four boards could not be counted without a JavaScript browser and are excluded rather than estimated.

9. What happens next

The index reruns in early October 2026 on the same company list, deltas reported, newcomers listed separately, Europe-filtering standardised, and the four blocked boards counted via a rendering browser. Company-level CHI joins the Traction Scoreboard as a standing field. Three things to watch in Q4: whether any launcher posts a senior commercial role; whether the defence flavour of commercial hiring intensifies as EU budgets land; and whether the zero-hiring cluster in EO and SSA starts posting again, or starts consolidating formally instead.

If European space is serious about its commercial transition, the place it will show up first is not a press release. It is a job board.

Appendix A. Full company table (verified counts, 17 July 2026)

Company	Segment	Total	ENG	COM	OPS	UNCLEAR
Isar Aerospace (DE)	Launch	94	69	3	19	3
Rocket Factory Augsburg (DE)	Launch	43	35	1	7	0
Skyrora (UK)	Launch	0	0	0	0	0
Latitude (FR)	Launch	12	11	0	1	0
Orbex (UK)	Launch	17	15	0	2	0
HyImpulse (DE)	Launch	14	12	1	0	1
The Exploration Company (DE/FR)	In-orbit cargo	10	10	0	0	0
Constellr (DE)	EO thermal	4	2	0	1	1
Kuva Space (FI)	EO hyperspectral	1	0	1	0	0
SatVu (UK)	EO thermal	1	0	1	0	0
OroraTech (DE)	EO wildfire	2	0	0	2	0
Unseenlabs (FR)	EO RF	12	6	2	3	1
Prométhée (FR)	EO	0	0	0	0	0
Sensing, form. Absolut Sensing (FR)	EO methane	2	1	0	1	0
LiveEO (DE)	EO analytics	12	4	7	0	1
Kayrros (FR)	EO analytics	0	0	0	0	0
Vyoma (DE)	SSA	3	3	0	0	0
Aldoria (FR)	SSA	0	0	0	0	0
Spaceflux (UK)	SSA	2	2	0	0	0
ClearSpace (CH)	In-orbit servicing	0	0	0	0	0
D-Orbit (IT)	In-orbit logistics	15	13	1	1	0
ThrustMe (FR)	Propulsion	22	16	2	4	0
Exotrail (FR)	Propulsion	33	25	1	5	2
Morpheus Space (DE)	Propulsion	0	0	0	0	0
Dcubed (DE)	Components	6	4	1	1	0
EnduroSat (BG)	Satellite manufacturer	55	31	8	14	2
Kongsberg NanoAvionics (LT)	Smallsat buses	7	4	1	2	0
AAC Clyde Space (SE/UK)	Smallsat & components	7	5	2	0	0
GomSpace (DK)	Smallsat	23	13	5	2	3
Reflex Aerospace (DE)	Satellite manufacturer	18	18	0	0	0
Pangea Propulsion (ES)	Propulsion	10	10	0	0	0
Magdrive (UK)	Propulsion	2	1	0	1	0
Arkadia Space (ES)	Propulsion	9	6	0	2	1
Sateliot (ES)	Satcom IoT	5	2	2	1	0
OQ Technology (LU)	Satcom IoT	9	4	3	2	0
Kinéis (FR)	Satcom IoT	3	2	1	0	0
Leaf Space (IT)	Ground segment	4	3	1	0	0

Company	Segment	Total	ENG	COM	OPS	UNCLEAR
Open Cosmos (UK)	Missions / downstream	65	48	4	6	7
Spire Global, EU offices (UK/DE)	Downstream data	25	15	4	4	2
Mission Space (LV)	Space weather	0	0	0	0	0
OKAPI:Orbits (DE)	SSA/STM software	13	11	1	0	1
Infinite Orbits (FR)	In-orbit servicing	45	38	1	3	3
Astroscale EU/UK entities	In-orbit servicing / SSA	13	9	0	2	2
Look Up Space (FR)	SSA radar	4	4	0	0	0
TOTAL (44 companies)		622	452	54	86	30

Not countable on the measurement date (JavaScript-only boards): PLD Space, ICEYE, Neuraspace, KSAT. Verified corrections incorporated: Open Cosmos 89 to 65; eight evergreen talent-pool postings removed; two titles reclassified to UNCLEAR. Sources: company careers pages and ATS boards, full URL list in the dataset workpapers.

Appendix B. Commercial titles, verbatim (selection)

Company	Commercial openings as posted
Isar Aerospace	(Junior) Marketing Specialist; Communications Specialist; (Junior) Proposal Engineer
LiveEO	Head of Customer Success; Senior BD Manager, Government Program Germany; Senior Institutional BD Manager, Government Program EU; BD Representative North America; Account Executive CEE; Account Executive North America; Enterprise Sales Engineer
EnduroSat	BD Manager Government Sector (Berlin); BD Manager Government Sector (Munich); BD Manager Satellite Sales (Washington DC, Los Angeles, Denver); BD Manager Space Hardware (Denver); BD Manager (Naples, Toulouse)
GomSpace	Senior Business Development Director, Defence; Offset Business Development Director, Global Defense Markets; Project Capture Manager; Commercial Operations Manager; Partnership Manager
Spire Global (EU)	Sales Manager Weather & Climate EMEA & APAC; Senior Sales Engineer (Glasgow); Senior Manager Digital Marketing & Channel; Social Media & Content Manager
Open Cosmos	Sales Lead, Earth Observation Data (Europe); EO Presales Engineer; Data Customer Success Manager; Bid Manager
OQ Technology	Proposal Manager; Sales and BD Manager Australia; Sales and BD Manager Saudi Arabia
ThrustMe	B2B Sales Coordinator; Technical Sales Engineer
AAC Clyde Space	Business Development & Sales Manager (London); Head of Business Development UK, Sweden, Netherlands
Sateliot	Sales Development Representative (Australia); International Sales Development Representative (Junior)

Company	Commercial openings as posted
First hires elsewhere	Dcubed: Marketing Lead (only commercial opening); Leaf Space: Head of Customer Success; Kinéis: communications internship; Kuva Space: Senior Marketing Manager; SatVu: Marketing Operations Coordinator; HyImpulse: Institutional BD Manager; RFA: Communications & PR Manager; OKAPI: Sales Manager Space Applications; D-Orbit: Sales & Delivery Operations internship; Infinite Orbits: Sales Engineer; Unseenlabs: Customer Success Manager, Chargé de Marketing

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