ASD-EUROSPACE
The Space group in ASD

ASD-Eurospace

Organisation, activities & added-value at your service

Our main features

Advocacy, cohesion, compliance, policy & market monitoring

About us

- **Not-for-profit association (French Law of 1904) created in 1961**
- In April 2004: Eurospace becomes ASD-Eurospace, the Space group in ASD by Memorandum of Agreement

- **ASD-Eurospace is the professional organisation of the European space industry**
- **Mandates**
- *Promote space activities in the interest of its members*
- *Define, adopt and express common views for the European space manufacturing sector*
- *Eurospace seeks consensus at each and every level of its action*
- **Membership**
- *Eurospace members are European companies active in design, development and integration of space systems (launchers, spacecrafts, ground segment, related engineering services and tests)*
- *Eurospace membership represents 70% of the total European manufacturing industry employment and >90% of final sales*

- **ASD-Eurospace is a recognised actor of European space policy and strategy**

Our commitment to transparency

Operational Budget

1-1.5M€
Covers salaries and the associations' low operating costs (e.g. rent, travels)

Funding

Our main resource come from membership fees (approx. 900k€), which guarantees Eurospace independence of views and autonomy of action.

Other resources come from Workshops & Conferences organisation, and external contracts (ESA, EU, third-party organisations - approx 150-250k€).
They are selected based on existing synergies with Eurospace actions and added value for the members

Transparency & Accountability

Annual accounts are certified by external auditors and published on our website, with the annual management report.

Eurospace is registered under ID 873508417106-05 on the EU Transparency Register

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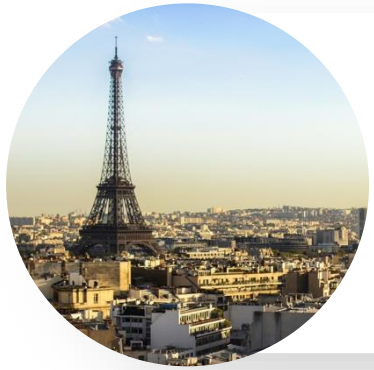
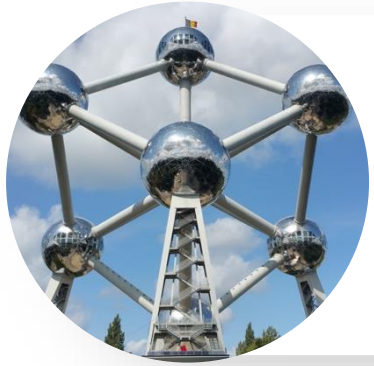
Locations



Paris, France

22 Rue du Quatre Septembre F-75002
Paris

Headquarters, main meeting room, SG and staff, close relationship with ESA HQ



Brussels, Belgium

100 rue du Trône B-1050
Brussels

Hosted by ASD, SG and staff, mainly relations with EU institutions and interacting with ASD bodies

Meet our Team

Olivier Lemaitre
Secretary General

Pierre Lionnet
Research & Managing Director

Jean-Charles Treuet
Technology Director

Lea Kessler
Policy Manager

Ilona Zabrytska
Policy Manager

Nédhir Sahli
Research Analyst

Valentin Marie
Compliance Manager

Nathalie Alecton
Conference & Office Manager

High-level bodies

President

Eurospace President is elected for 3 years

Current President is Marco Fuchs (OHB)

Past Presidents:
- Jean Delorme
- Armand Carlier
- Pascale Sourisse
- Evert Dudock
- Marco Fuchs
- Jean-Loic Galle
- André-Hubert Roussel
- Jean-Marc Nasr

General Assembly

Elects the President, Council, and Financial Committee members

All Eurospace members are represented

All Eurospace members have same voting rights

Council

Political body which takes all decisions

Up to 27 elected members, plus the ASD Secretary General

Chaired by Eurospace President

Financial Committee

In charge of the financial control of the Association

Composed of the Treasurer (Chairperson) + 2 members

Nominated by Council, endorsed by General Assembly

Working Bodies

Policy Committee

- The advisory board to the Council
- The role of the PC is to submit policy proposals to the Council and to take initiatives to promote and develop space activities
- Sharing of policy-related information between members
- Consolidating and converging on policy decision
- Providing guidance and direction for Eurospace executive actions

Task Forces & Panels

- Created at the initiative of the PC or IRTC, Task Forces, working groups and panels are composed and chaired by industry representatives
- They promote industry cohesion and collaborative work
- They propose position papers, assessments and reports to Council approval
- Coordination and support is provided by Eurospace Executive (meeting rooms, agenda and minutes drafting, activities coordination, list management, analysis and policy support etc.)

Innovation, Research & Technology Committee

- Technology Pendant of the Policy Committee
- The role of the IRTC is to ensure consistency and prioritisation of Eurospace technology-related messages
- Steering of Eurospace technology strategy actions
- Focal point for expertise on technology issues
- ORDIN supervision and management

Membership

More than 80 members in 17 European countries

European suppliers of space systems, software, and engineering services

70% of European space industry employment

- Beyond Gravity Austria
- Enpulsion

- Aerospacelab
- AntwerpSpace N.V.
- GMV Innovating Solutions S.R.L. (B)
- SABCA
- Safran Aero Boosters
- SpaceBel
- ST Engineering iDirect Europe CY NV
- Telespazio Belgium S.R.L
- Thales Alenia Space Belgium

- TERMA A/S

- ICEYE

- Air Liquide Advanced Technologies
- Air Liquide France Industry
- Airbus Defence & Space Sas
- Aldoria
- ALTER Technology-TÜV Nord France
- Arianegroup Sas
- Arianespace
- Astroscale France
- CGI France SAS
- CS Group France
- Dassault Aviation
- Exotrail
- GMV Innovating Solutions SARL
- Loft Orbital
- REOSC
- Safran Aircraft Engines
- Safran Data Systems
- Safran Electrical & Power
- Safran Electronics & Defense
- Safran Engineering Services
- Safran Filtration Systems
- Thales Alenia Space France

- Airbus Defence & Space GmbH
- Arianegroup GmbH
- AZUR Space
- CGI Deutschland B.V & Co. KG
- CS GmbH
- GMV GmbH
- MT Aerospace AG
- OHB Systems AG
- TESAT Spacecom GmbH&Co. KG
- Thales Alenia Space Germany
- TÜV Nord

- ALTEC
- AVIO SpA
- eGEOS
- Elecnor Infrastrutture e Aerospaziale
- Leonardo
- Leaf Space
- OHB Italia
- SITAEL SpA
- Space Industries
- Telespazio Italy SpA
- Thales Alenia Space Italy

- Thales Alenia Space Luxembourg

- GMV Innovating Solutions B.V
- MOLTEK
- TNO

- Kongsberg Defence & Aerospace

- GMV Innovating Solutions Sp.z o.o.
- Thales Alenia Space Poland

- Deimos Engenharia
- GMVIS Skysoft S.A.
- Neuraspace

- CS Romania
- Deimos Space Romania
- GMV Innovating Solutions S.R.L.

- Airbus Defence & Space S.A.U.
- ALTER Technology-TÜV Nord S.A.U.
- GMV Soluciones Globales Internet S.A.U.
- GTD Sistemas de Informacion
- Indra Sistemas SA
- Indra/Deimos
- Pangea Aerospace
- SENER Aeroespace and Defence
- Thales Alenia Space Spain

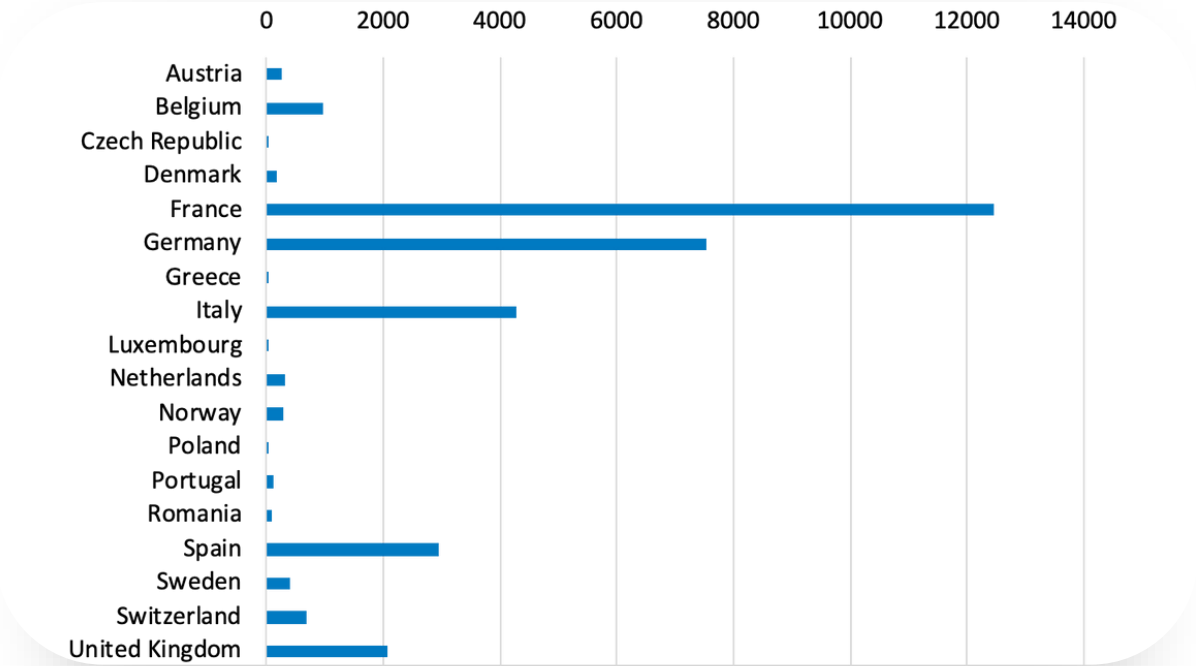
- Beyond Gravity AB

- APCO Technologies
- Beyond Gravity Swiss
- ClearSpace
- Thales Alenia Space Switzerland

- Airbus Defence & Space Ltd
- ALTER Technology-TÜV Nord UK
- Deimos Space UK
- GMV NSL Limited
- OpenCosmos

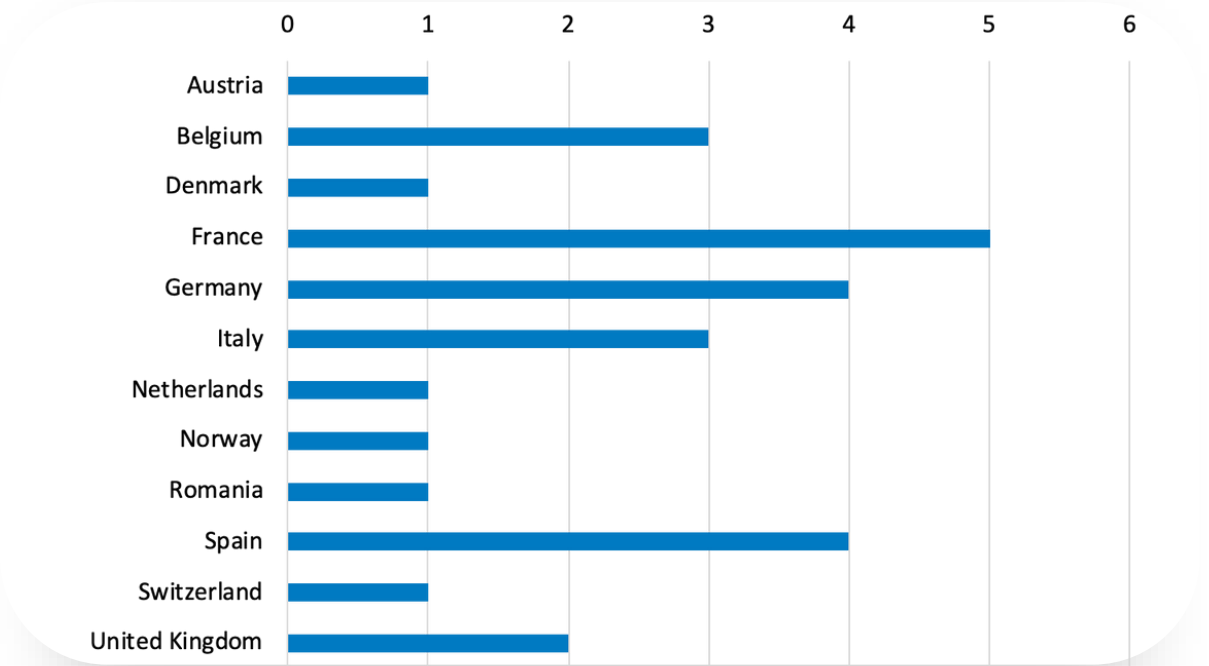
Membership status per country

Eurospace members employment by country



Eurospace members employment distribution by country is representative of the sector geographical distribution

Eurospace Council members by country



Council composition is proportional to company size, also gives representativeness to smaller players/countries

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How to be involved?

Who?

- **European stakeholders involved in the design, development, production, integration and test of space systems can be involved in Eurospace in two ways:**

  - **Active membership**
    - Proportional to company size
    - Gives access to all activities of the association
      - Except some ad hoc task forces with separate budget (REACH compliance e.g.)
    - Membership starts at 1500€/year for SMEs and at 10000€/year for larger companies.
      - See Membership options details in annex

  - **Partial involvement as non members (ad hoc processes, free of charge and opt-in)**
    - Involvement in ESA/EU-coordinated formal consultations
    - Participation in the annual Eurospace facts and figures (F&F) survey
    - Involvement in specific industry driven working groups and task forces (ORDIN, REACH, ECSS, ESCC...)

What?

- **Involvement in ESA/EU-coordinated formal consultations**
  - Technology strategy (via ORDIN), supports Technology Harmonisation process (Harmo), Horizon Europe, Standardisation (ECSS) and EEE components strategy (ESCC)
    - No Eurospace fee, participation costs limited to personnel involvement in the activities (time to review documents and provide feedback, when relevant: meeting attendance and travel costs)

- **Participation in the annual Eurospace facts and figures (F&F) survey**
  - Involves answering to an electronic questionnaire
    - Participation is free and provides access to a free copy of the PDF report to respondents
  - The F&F survey is widely recognised as the most reliable assessment of the European space system market in Europe. It is benchmark of space industry surveys (assessed by OECD)

- **Involvement in industry driven Task Forces & Panels**
  - Task Forces are created by request of Members and the Executive, and approved by the PC
  - Task Forces have a focused goal/objective, a limited mandate and a defined output
  - When needed (rare), Task Forces levy a specific participation fee to cover Task Force costs.
    - This is done through a simple Purchase order to Eurospace and is covered by a signed Task Force Agreement between all members

How?

- **Advocacy**
  - Official European space industry spokesperson:
    - ESTMP/Harmonisation, ESCC, ECSS, etc
  - Relationship with ESA and EU institutions (Commission, Parliament, European External Action Service, European Defence Agency…)
- **Industry Cohesion**
  - Task Forces & panels are the core activity of Eurospace as primary means to:
    - Inform and stay informed (information exchange)
    - Identify industry issues
    - Prepare industry positions
    - Networking
- **Information about industry**
  - Industry statistics:
    - Eurospace facts and figures – annual publication
  - Market statistics
    - LEAT database
- **Liaison with other bodies**
  - In Europe (ASD, EARSC, GSOA, SME4Space, ESRE, ESPI, Nereus etc.)
  - Internationally (SJAC, AIA etc.)
  - Academic and science (IAF, AAAF, Cospar, Copuos, etc.)
  - Non European Space Agencies (Jaxa, ISRO, NASA etc.)

Resources & Publications

Monthly Newsletter

A monthly digest of current policy topics, work undergoing at Eurospace, and meeting/workshop opportunities

Briefings, information notes, reports of conference & opinion papers

EU Policy and programmes, ESA Policy and programmes, space economics

Data & analytics reports

LEAT database of launch events, Eurospace facts and figures, European space budgets consolidation, Newspace observatory

Our Commitments

Neutrality

- The Eurospace Team is hired by the Association to promote the interest of its members and is not functioning on a secondment approach
- Eurospace being a consensus-driven organisation, we can guarantee that no interest in contradiction with your company's business will be expressed by our organisation

Confidentiality

- The Eurospace Team respects the confidentiality of all individual exchanges with members to guarantee the discreet expression of all corporate interests in confidence

Equal treatment

- We consider all members' positions on an equal footing and pay same amount of time to answer our members' requests (no commensuration with regard to to the size of the company)
- We make sure, through continuous ad hoc exchanges, that we answer the expectations and needs of all members, in particular smaller companies (which don't have dedicated institutional relations teams)

Reactivity

- All our activities have a common objective: putting your company in a position to maximise its level of knowledge/anticipation/understanding regarding the evolution of the European institutional environment, with the aim to open up new opportunities for your business to grow

Representativeness supports credibility

- No ‘black hole’ in Eurospace membership: we represent more than 90% of final sales and 70% of sector employment on the upstream segment of the value chain in Europe : the representativeness of our association is absolutely undisputed at ESA and in EU institutions
- Our analysis and assessments are always on point and backed by data and undisputable facts
- Eurospace facts & figures is the reference for European space industry economic assessment

Consistency and independence

- Few trade associations lead policy/advocacy-related activities while developing a specific and recognised economic expertise as well as R&T oriented actions or standardisation tasks. This wholesomeness:
- is a mark of consistency & credibility towards our institutional counterparts
- supports the best lines of communications and the right approach to presenting and decrypting sector issues

European footprint well adapted to the institutional environment

- Our membership being composed of EU/ESA industries, our industrial base is very homogenous, which allows our association to convey very consistent messages, in particular on industrial policy-related topics

Eurospace facts&figures

The Eurospace Facts & Figures is established, since 1996, as the reference information document for European space industry economic data.

- **The survey aims at providing an accurate picture of the situation of the European space manufacturing industry in Europe.**
- **The survey focuses on measuring**:
  - Sales of space products (Total sales, Final sales, Intersector sales)
  - Employment figures
- **The boundaries of the survey are provided by**
  - Geographical boundaries:
    - Are only considered companies with operations on European ground
      - Companies performing work performed outside Europe are outside the scope of the survey
      - European subsidiaries of non-European companies, with space activities on European ground are included in the scope of the survey
    - Definition of customers
    - Definition of products
- **Additional analysis is provided by grouping companies in appropriate categories**
  - Position in the supply chain (company types)
  - Relative specialisation on products (company segments)

Main findings of our 28th edition of our annual survey of European Space Industry activity with data updated to 2023 is available on Eurospace.org

- You will also find on www.eurospace.org the previous year's edition for free download
- Please read our copyright notice, our charts, and our data are copyright protected
- Contact Pierre Lionnet (pierre.lionnet@eurospace.org) for more information

Eurospace ORDIN Process

ORDIN: Open Research & Innovation Network

ORDIN supports a proactive consultation process on technology strategy open to all stakeholders from the whole European space supply chain

ORDIN is currently inactive as the GCSS Partnership is in place, please

Why

- Build Technology Plans
- Streamline & enhance the supply chain capacity to formulate clear and comprehensive recommendations for future R&D and innovation programmes to ESA and the EU, in time and with the appropriate level of detail

Who

- A process open to ALL the supply chain:
  - RTOs, SMEs, newspace/emerging players, midcaps and large groups, primes and equipment suppliers, labs and research entities

How

- A workshop-based approach
- To collect information on stakeholders, state-of-the-art, technology trends, requirements, challenges and drivers
- Workshops are open, free, and voluntary

What

- A development plan and requirements database
- A supply chain owned repository of technology requirements, capabilities, roadmaps and trends supports the formulation of recommendations as required, on-time, and under stakeholder control

Added value

- Supply chain cohesion
- Bottom-up/top-down technology strategy,
- Improved communication with European institutions
- A globally enhanced end-to-end European space technology strategy

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Globally Competitive Space Systems Partnership (GCSS)

The Space Partnership

What is the Space Partnership?

Objective

Provide strategic recommendations for Horizon Europe Work Programmes to enhance competitiveness

Coordination

Managed by SPACE AISBL

5 Founding Associations

Industry: Eurospace & SME4Space

RTO's: ESRE & EASTRO

Universities: EASN

Timeline

Official launch: in 2024

Inputs for calls: 2025 – 2026 – 2027

Project Monitoring until 2030

Strategic Focus

"Digitalisation for Commercial Space Solutions"

Budget

100M€ + 120M€

European Commission + Leverage from Private Partners

3 Focus Areas

Commercial Telecommunications (including ground segment)

Commercial Earth Observation (including ground segment)

New Space Transportation Solutions

Policy & Technology Task Forces

Currently active Task Forces

- Task Forces, created at the initiative of the Policy Committee, are composed and chaired by industry representatives. Coordination and support (minutes, invitation, supporting data and documents…) of Task Forces activities is provided by Eurospace Executive.
- Task Forces are created with a specific objective and a limited time frame. They can involve a subset of Eurospace members and can accommodate the participation of non member entities. Current active Task Forces are:

Policy TFs

- EU Space Act
- ESA/EO for CM25/European Resilience from Space (ERS) Task force
- Space Safety
- ESA Industrial Policy
- EU Access to Space

Techno TFs

- Horizon Europe TF (since 2017)
- Space Research & Technology Committee
- Standardisation WG
  - EEE Panel
- REACH:
  - CSS SFG – Space Focus Group
  - EMWG – Energetic Materials Working Group
  - LTF – Lead Metal Task Force t
  - RTF – Restrictions Task Force
  - STF – Space Chromates Task Force
  - WFD/SCIP TF – Waste Framework Directive Task Force

Compliance

Compliance

Created in 1995 to set up and maintain a coordinated set of industry standards for space systems design development and manufacturing

- ECSS brings together ESA, national agencies and industry (through Eurospace) to share the financial and technical efforts to establish the standards
- Eurospace is a signatory to the ECSS industry charter. It has a blocking minority in the relevant bodies.
- It also nominates and monitors the WGs that develop ECSS standards and coordinates ECSS positions towards ISO via the EAQG/IAQG.
- It ensures the interface with the European Standardisation Centre (EU)

Created in 1995,the ESCC brings together users and suppliers of space qualified components to design suitable strategies for European space systems.

- The CTB (Components Technology Board) monitors components situations and produces strategic plans for ESA and the EU programmes
- Eurospace is a signatory of the ESCC Charter for Industry.
- It has a blocking minority in the relevant bodies.
- It also ensures coordination with ECSS (ESCC is the technical authority for the standards of the 60th branch).

Eurospace supports the coordination and implementation of joint space industry actions in the REACH framework with dedicated Task Forces

- REACH Task Forces enable to pooling of industry resources for regulatory monitoring of REACH obligations and the facilitating of compliance.

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Thank You

Annex: Eurospace membership

Fees & Procedure

Eurospace: 4 membership categories

Art. 6 Active Members

- Active membership is reserved for space companies of ESA or EU member countries which have been formed in accordance with the legal procedure of these countries.
- Most Eurospace members are relevant to Art. 6

Art. 7 Collective Members

- Collective membership is reserved for non-commercial associations of space companies of ESA and EU member countries which have been formed in accordance with the legal procedures of these countries.
- Collective membership are very selectively authorised by Council
  - they are usually granted to professional associations representing space interests in emerging countries only if there are no active members form that country

Arti. 8 Corresponding Members

- Corresponding membership is reserved for companies and non-commercial Associations which do not meet the requirements of Articles 6 and 7.

Art. 9 Honorary Members

- Honorary membership may be granted by the Council to persons who have rendered valuable services to EUROSPACE.

Membership fees

The value of membership fees is approved every year by the General Assembly

- following recommendations by the Council and the Financial Committee.

Active members contribute a membership fee proportional to their size

- 5 membership options are available, starting at 1725€
- see page 4 and following

Collective members contribute a fixed membership

- 1250€/year

Corresponding and Honorary Membership fees

- have not been defined (yet)

Active members

Membership options and related fees formulas

Membership fees are annual fees

- Fees are invoiced at the beginning of each year based on FTE declarations of the previous year (the 'reply slips').
- New members joining during the year are invoiced at the beginning of the next year.
- As soon as the new member is endorsed by Council, full membership benefits apply.
- Membership fees include a fixed entry fee plus a variable fee proportional to the company size
- The fixed entry fee is defined by corporate size, with five options
- Legacy: the original 'one size fits all' fee scheme of Eurospace
- SME: a membership option tailored to the needs of SMEs (according to EU definition)
- Small size groups: for corporate entities joining as a group, available to entities up to 250 space employees, no minimum listing of entities. New scheme enables more progressive accession
- Mid size groups: for corporate entities joining as a group, available to entities up to 3000 space employees
- Large groups: for corporate entities joining as a group, available to entities having more than 3000 space employees
- The variable fee is proportional to the value of space employment in the company
- The value of space employment is self assessed by active members every year
- The value of space employment is based on actual Full Time Equivalent employment resources attributed to the pursue of space activities in the company in the year

Membership options
(Updated after General Assembly decision of June 2025)

"Legacy" membership

- Accessible to historic members that wish to retain this scheme and new members not applying as a Group
- Formula:
  - 10000€ entry fee (inclusive of 100 space employees)
  - 20,32€ for each employee above 100

"Large group" membership

- New in 2022
- Accessible to all members with a European footprint, and 3000 space employees or more
- Minimum listing of 2 corporate entities
- Formula
  - 34500€ entry fee (inclusive of 750 employees)
  - 22€ for each employee above 750

"Mid-size/midcap group" membership

- New in 2022
- Accessible to all members with a European footprint, and less than 3000 space employees
- Minimum listing of 2 corporate entities
- Formula
  - 11500€ entry fee (inclusive of 250 employees)
  - 22€ for each employee above 250

"Small Group" membership

- New in 2025
- Accessible to SMEs, and small space units (<250 space FTE)
- Formula
  - 4600€ entry fee (inclusive of 100 employees)
  - 22€ for each employee above 100

"SME membership"

- New in 2022
- Accessible to SMEs
- Formula
  - 1725€ entry fee (inclusive of 30 employees)
  - 22€ for each employee above 30

Membership calculations examples

"Legacy" membership

- Example 1: Single company with 4500 employees
- Entry fee: 10000€
- Variable fee: 20,36€ for each employee above 100 (4400*20,36=89584€)
- Total fee: 99584€
- Example 2: Single company with 280 employees
- Entry fee: 10000€
- Variable fee: 20,36€ for each employee above 100 (180*20,36=3665€)
- Total fee: 13665€

"Mid-size/midcap group" membership

- Example 1: Group with 4 entities spread in Europe with a total of 280 employees
- Entry fee: 11500€
- Variable fee: 22€ for each employee above 250 (30*22=660€)
- Total fee: 12150€
- Avg/entity: 3037,5€
- Example 2: Group with 4 entities spread in Europe with a total of 1800 employees
- Entry fee: 11500€
- Variable fee: 22€ for each employee above 250 1550*22=34100€)
- Total fee: 45600€
- Avg/entity: 11400€

"Large group" membership

- Example 1: Group with 8 entities spread in Europe with a total of 12000 employees
- Entry fee: 34500€
- Variable fee: 22€ for each employee above 750 (11250*22=247500€)
- Total fee: 282000€
- Avg/entity: 35250€
- Example 2: Group with 8 entities spread in Europe with a total of 5500 employees
- Entry fee: 34500€
- Variable fee: 22€ for each employee above 750 4750*22=104500€)
- Total fee: 139000€
- Avg/entity: 17375€

"Small Group" membership

- Example 1: SME with 70 employees and 2 European sites
- Entry fee: 4600€
- Variable fee: 22€ for each employee above 100 (0*22=0€)
- Total fee: 4600€
- Example 2: Small space unit with 130 employees
- Entry fee: 4600€
- Variable fee: 22€ for each employee above 100 (30*22=660)
- Total fee: 5260€

"SME" membership

- Example 1: SME with 40 employees
- Entry fee: 1725€
- Variable fee: 22€ for each employee above 30 (10*22=220€)
- Total fee: 1945€
- Example 2: SME with 200 employees
- Entry fee: 1725€
- Variable fee: 22€ for each employee above 30 (170*22=3400€)
- Total fee: 5125€

The reply slip

Member information			
Entity name	Country	Space FTE	Membership fee (VAT excl.)
			€ -
			€ -

Member information: includes the name, country and space employment information of the entity(ies) joining Eurospace.

- For SME and Legacy memberships only one entity is allowed.
- For group memberships an unlimited number of entities is allowed

Representative to the General Assembly				
First name	Last Name	Position	Email	Mobile

Each entity listed in the reply slip is a full active member of Eurospace and must designate a representtaive to the General Assembly.

Invoice information							
Entity name	VAT Number	Purchase Order Ref.	Address (Street, number and/or PO box)	Postcode	City	Country	email contact for invoice if needed
0						0	
0						0	
0						0	
0						0	

For each entity joining Eurospace the invoicing information shall be provided for the payment of the membershi^p fee. Group members have the option of settling one invoice at group level or separate pro-rate invoices at entity level.