

# EUROSPACE

Organisation, activities & added value at your service

December 2020

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# Eurospace: our main features

# ASD-Eurospace : the Association (1/3)

- No profit association (French Law) created in 1961
  - and since April 2004: the Space group in ASD
- 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 approximately 70% of the total European manufacturing industry employment
  - **ASD-Eurospace is a recognised actor of European space policy and strategy**

# ASD-Eurospace : the Association (2/3)

- Operational Budget: approx. 1M€-1.5M€
  - Income: Membership fees (approx. 900k€), Conference and Workshop organisation
  - Own resources cover salaries and the association's low operating costs (rent, travels etc.)
  - The membership fees paid by industry guarantee Eurospace independence of views
- Eurospace also selectively performs external contracts (ESA, EU, third-party organisations) – approx. 400k
  - Valorise Eurospace's expertise and create added-value to its members

# ASD-Eurospace : the Association (3/3)

- Offices in Paris and Brussels
  - In Paris: Headquarters, main meeting room, SG and staff, close relationship with ESA HQ
  - In Brussels: hosted by ASD, SG and staff, mainly relations with EU institutions and interacting with to ASD bodies
- Workforce: the Executive, a permanent staff of 8 (plus interns):
  - Secretary General: Olivier Lemaitre
  - Director of Research: Pierre Lionnet
  - EU Policy Analyst: Zohra Mokadem
  - Databases and Technology Strategy: Jean-Charles Treuet
  - Databases and Support to Standardisation: Angel Cuellar
  - Policy Manager: Charles Galland
  - Technology Strategy Manager: Jérémy Hallakoun
  - Office and Conference Manager, Administrative Assistant: Nathalie Alecton

*“Engineering, space economy, business, political affairs: our dedicated team combines a unique set of multidisciplinary profiles to cater all your needs”*

# ASD-Eurospace Bodies in a nutshell (1/2)

## High level Bodies

President	Eurospace President is elected for 3 years. Current President: André-Hubert Roussel (ArianeGroup) Past Presidents: Armand Carlier, Pascale Sourisse, Evert Dudock, Marco Fuchs, Jean-Loic Galle
General Assembly	Elects the President, Council and Fin. Com. members <ul style="list-style-type: none"><li>• All members are represented</li><li>• All members have same voting rights</li></ul>
Council	Political body which takes all decisions <ul style="list-style-type: none"><li>• 24 elected members, plus the ASD Secretary General</li><li>• Chaired by Eurospace President</li></ul>
Policy Committee	Plays the role of an advisory board to the Council <ul style="list-style-type: none"><li>• Chaired by the Secretary General</li></ul>
Financial committee	In charge of the financial control of the Association <ul style="list-style-type: none"><li>• The treasurer (chairperson) + 2 members</li></ul>

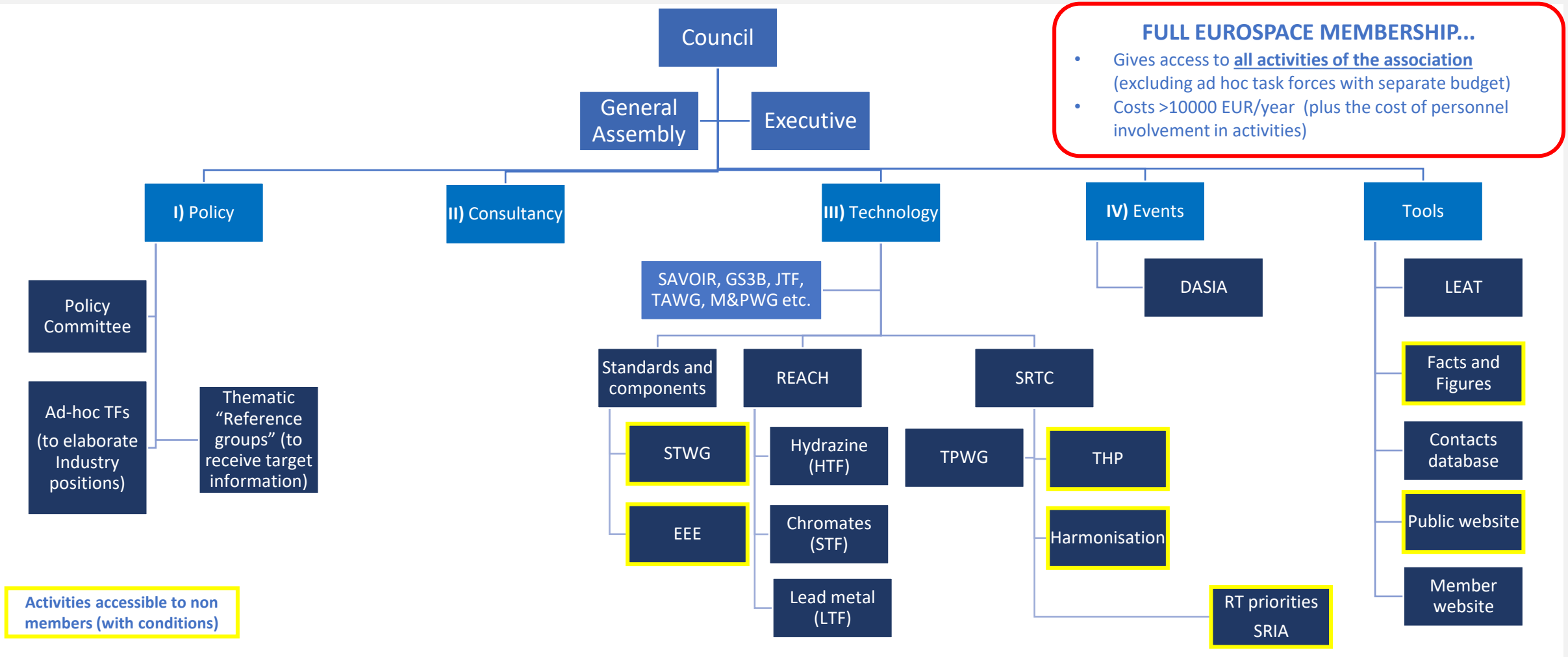
# ASD-Eurospace Bodies in a nutshell (2/2)

## Working Bodies

<p>Policy committee</p>	<p>The role of the Policy Committee is to submit policy proposals to the Council and to take initiatives to promote and develop space activities”.</p> <p>The PC is in practice the body where any relevant policy-related information are exchanged amongst members, where political decision are consolidated, and where Eurospace executive receives its guidelines concerning advocacy and lobbying activities.</p>	
<p>Task force &amp; panels</p>	<p>Created at the initiative of industry, task force, working groups and panels are composed and chaired by industry representatives</p> <ul style="list-style-type: none"> <li>• They support the elaboration of consolidated industry viewpoints</li> <li>• They propose position papers, assessments and reports to Council approval</li> <li>• Coordination and support is provided by Eurospace Executive (meeting rooms, agenda and minutes drafting, activities coordination, list management, etc.</li> </ul> <p><b>WG and TF:</b> proactive bodies focusing on networking, information, and lobbying activities</p> <ul style="list-style-type: none"> <li>• They tend to focus on policy and strategy aspects</li> <li>• Participation in working groups requires Eurospace membership</li> </ul>	<p><b>Panels:</b> have a mandate to widely represent industry within activities coordinated at European level (e.g. ESCC, ECSS, THP)</p> <ul style="list-style-type: none"> <li>• They usually address technology related issues</li> <li>• Industry participation in Panels does not necessarily require membership in Eurospace.</li> </ul>

**Eurospace seeks consensus at each and every level of its action**

# A 4-Branch operational organisation





# ASD-Eurospace Footprint in 2020



**> 40 members in 14 European countries**

- ADS (UK)
- AIR LIQUIDE
- APCO Technologies
- Arianespace
- Airbus Defence & Space Spain
- Airbus Defence and Space SAS - Satellites France
- Airbus Defence and Space Ltd (UK)
- Airbus Defence and Space GmbH - Satellites
- Airbus Defence and Space Netherlands B.V.
- Ariane Group France
- Ariane Group Germany
- Alter Technology
- Avio SpA
- AZUR Space Solar Power GmbH
- CGI IT
- Dassault Aviation
- DEIMOS Space
- Fundacion Tecnalia Research & Innovation
- GMV Aerospace & Defence S.A.U.
- IABG
- Indra Sistemas SAS
- Kongsberg Defence & Aerospace
- MT Aerospace AG
- NLR
- OHB Italy
- OHB System AG
- PROESPAÇO (PT)
- RUAG Schweiz AG - RUAG Space
- Ruag Space Finland Oy Ag
- RUAG Space GmbH
- RUAG Space AB
- SABCA
- Safran Aircraft Engines
- SCISYS UK Ltd.
- Sener SA
- Sitael S.p.A.
- Telespazio
- Terma A/S
- Tesat Spacecom GmbH & Co. KG
- Thales Alenia Space France
- Thales Alenia Space Espana SA
- Thales Alenia Space Belgium
- Thales Alenia Space Italia SpA
- TNO
- TTTech
- Vitrociset SpA

# How to be involved

# How to be involved

- European stakeholders involved in the design, development, production, integration and test of space systems can be involved in Eurospace in many ways:
- Full membership
  - Gives access to all activities of the association (excluding ad hoc task forces with separate budget)
  - Costs (plus the cost of personnel involvement in activities) – membership fees calculation is currently being redefined, a new system should be available in January 2021.
    - Basic amount below 10 persons is of 1210€
    - Basic amount up to 100 persons is of 8500€
    - Above 100 persons: basic amount (8500€) + 20€/person.
- Involvement in ESA-coordinated formal consultations
- Participation in the annual Eurospace facts and figures (F&F) survey
- Involvement in industry driven working groups and task forces

# How to be involved

- Involvement in ESA-coordinated formal consultations
  - **Technology Harmonisation process** (Harmo), **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 gives access to 5 copies of the print report per responding entity.
  - The F&F data is widely recognised as the most reliable assessment of the European space system market in Europe.
- Involvement in industry driven working groups and task forces
  - Task forces are created by request of any member company in Eurospace with a focused goal.
  - If needed 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.

# ASD-Eurospace: Core Activities

- **Industry representation and spokesperson**
  - 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...)
- **Coordination and information of industry**
  - Working groups, task forces and 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)
  - Public web: [www.eurospace.org](http://www.eurospace.org)
- **Liaison with other industrial bodies**
  - In Europe : ASD, EARSC, ESOA, SME4Space, ESRE, ESPI, Nereus etc.
  - Internationally: SJAC, AIA etc.
- **Liaison with non industrial bodies**
  - Academic and science: IAF, AAAF, Cospar, Copuos, etc.
  - Non European Space Agencies: Jaxa, ISRO, Roskosmos, NASA

# Our Added-value for your Business

# ‘Your Pen’

- Contribution to the elaboration of Eurospace position papers, through Eurospace WG & TF or Policy Committee
  - E.g : Position Paper on the industry’s ambition for Copernicus after 2020 (2018)/
- Contribution to Eurospace reactions with respect to topical issues
  - E.g :Amendments to the EU space programme or HEU regulation (2018)/ HEU Workprogramme preparation/ REACH impact surveys/ ESA industrial policy/ Covid impact on European space industry – Full references here: <https://eurospace.org/publication/position-papers/>

# ‘Your Voice’

- We carry, formally and informally, the messages elaborated collectively through Eurospace bodies, covering the interest of your company
- We help you reach out relevant EU decision makers (DG DEFIS, DG CONNECT, other EC DGs, Permanent Representations, Members of the European Parliament, other Brussels-based stakeholders) on an opportunistic basis
- We also help you connect with potential partners and customers in the sector, and facilitate the organisation of your events
  - All our mailing and contacts lists are GDPR compliant

# ‘Your Ears’

- Targeted monitoring, and distribution of institutional information (in time for efficient political action) from ESA and EU institutions on areas of relevance to your business (eg : Copernicus LTS, EDIDP draft WP, draft versions of the EU space programme regulation...)
  - Most of the time original/full documents + highlights and commentary

# Information resource

- Eurospace provides its members a consistent policy watch focusing on ESA and EU
  - Policy updates with summary of key issues
  - Early warning on European space policy topics (Access to early drafts documents)
  - Regular feedback from information exchanges with EU and ESA officials
- All our activities have a common objective:
  - Putting your company in a position to maximize its level of knowledge/anticipation/understanding regarding the evolution of the European institutional environment,
  - Our aim is to open up new opportunities for your business to grow

# Analysis and Data

- Eurospace provides to its members updated analysis and assessment on
  - EU Policy evolution
  - ESA Policy and programmes
  - Space economics
    - Sector analysis
    - Market Analysis
    - Budget analysis
- Eurospace maintains own data intelligence systems
  - Launch statistics since 1957
  - Eurospace facts and figures
  - European budgets consolidation



# Our Commitments

*Neutrality of  
the Eurospace  
executive*

- 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 of  
exchanges*

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

*No « second  
division »  
members*

- 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 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)

*Enabling  
anticipation  
for your  
business*

- 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, consistency and credibility*

- No 'black hole' in Eurospace membership : we represent more than 90% of final sales and 60% 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

*An « all encompassing » chain of activity*

- Few trade associations lead policy/ advocacy-related activities while developing a specific and recognized economic expertise as well as R&T oriented actions or standardization 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

*A 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

# Research and Publications

# Research and Publications

- Eurospace facts and figures
- Space R&DT priorities - The space SRA
- Industry position papers and policy briefs on various relevant subjects
- European annual budget review
- LEAT database (Annual launch activity review)
- Contribution to the Space Report (US Space Foundation)
  - Launch & market statistics
  - Commercial market metrics
  - ESA & EU analysis

# Facts and Figures – General Information

- The Eurospace facts and figures 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)
- F&F is established, since 1996, as the reference information document for European space industry economic data.
  - Main findings of our 24<sup>th</sup> edition of our annual survey of European Space Industry activity with data updated to 2019 is available on Eurospace.org (under Menu ‘Documents’)
  - You will also find on [www.eurospace.org](http://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](mailto:pierre.lionnet@eurospace.org)) for more information

# ESA-Coordinated Processes

*Participation is free for all stakeholders*

- Technology Harmonisation (Harmo)
- Standards development (ECSS)
- EEE components: strategy, qualification, certification (ESCC)

# ESA-Coordinated Processes

- **Harmonisation Process:**

- The Technology Harmonisation is a coordinated process initiated in 2000 aiming at associating all space technology stakeholders to collectively define technology development plans
  - **Harmonisation aims at building together with industry, research institutes and member states medium term technology development plans by technology areas.**
  - Harmonisation is a **unique opportunity to gather support for your future developments needs** and make your capabilities known and recognised in the community

- **ECSS - European cooperation for Space Standardisation:**

- 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

- **ESCC - European Space Components Coordination:**

- Created in 1995 to set up and maintain a coordinated set of industry standards for space systems design development and manufacturing
  - ESCC brings together ESA, national agencies and industry (through Eurospace) to share the financial and technical efforts to establish the standards



# Industry-driven activities

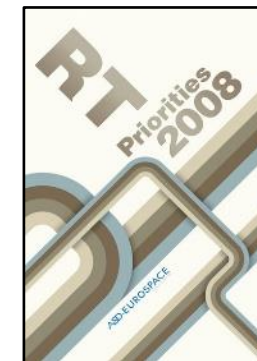
- The Task Forces
- The Strategic Research Agenda (RDT Priorities)
- The European Co-Programmed Partnership Preparation

# Task Forces

- At the request of industry Eurospace sets up ad hoc task forces to address short-medium term issues in a coordinated way with relevant industry stakeholders
  - REACH/Hydrazine TF – since 2011
  - REACH/Chromates TF – since 2014
  - FP9/Horizon Europe TF – since 2017
  - ESA Industrial Policy TF – since 2020
  - European Defence Fund TF – since 2020
  - Space Traffic Management TF – since 2020
- Each TF is set-up with a specific mandate and TF agreement
  - Some TF are open to non-members
  - In rare occasion, a TF can require a dedicated budget to perform its work, in this case it calls upon its members to provide the funding. The funding split and rules are defined in the TF agreement.

# RDT Space Priorities – Space SRA

- The Space RDT Priorities are a proactive initiative of Eurospace to raise awareness on key needs and expectations of the European space industry with regard to technology (RT/D).
- The consolidated roadmap is not a complete technology plan, it is an incremental roadmap of technology activities: activities and developments already well covered in current technology programmes are not considered
- The 2016 RDT Priorities set were formally validated after the informal consultation of ESA experts (full day workshop on 17/9/2015) and subsequent industry/stakeholder review
- The experience gathered since 2004 enabled Eurospace to effectively support the Commission-Led consultation platform for the elaboration of the Space technologies SRIA for Horizon Europe



# The European Co-programmed Partnership Preparation (STEPP follow-up)

- **Project Summary**
  - The STEPP project was carried out between July 2018 and February 2020. It supported the elaboration of consolidated inputs for the meetings of the COM-Led consultation platform. There were 8 meetings of the COM-Led consultation platform in the period.
- **Project Outcome**
  - STEPP supported the Commission-led consultation platform by providing specific inputs to the European Commission
  - Those inputs were elaborated to support the elaboration of the SRIA
  - After months of work, in September 2019, those consolidated inputs were presented to Commission and institutional stakeholders, as well as the experts from the Research and manufacturing sector.
  - The STEPP project has officially ended on February 20th 2020 with the release to the European Commission of the ‘STEPP Inputs for the SRIA for Horizon Europe Space Technologies’.
- **Way forward and Partnership preparation:**
  - Eurospace is fully involved in the preparation of a European Co-programmed partnership for “Global competitive space systems” proposed for implementation in Horizon Europe at the initiative of the European Commission.

# CONTACT POINTS

**Olivier LEMAITRE**

Secretary General

[Olivier.lemaitre@europspace.org](mailto:Olivier.lemaitre@europspace.org)

Paris Office: +33 1 44 42 00 70

Brussels Office: +32 2 775 81 20

**Pierre LIONNET**

Research Director

[Pierre.lionnet@europspace.org](mailto:Pierre.lionnet@europspace.org)

+33 1 44 42 00 72