

EUROSPACE

Organisation, activities & added value at your service

January 2021

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www.eurospace.org

www.eurospace-members.org

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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
 - 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">• All members are represented• All members have same voting rights
Council	Political body which takes all decisions <ul style="list-style-type: none">• 24 elected members, plus the ASD Secretary General• Chaired by Eurospace President
Policy Committee	Plays the role of an advisory board to the Council <ul style="list-style-type: none">• Chaired by the Secretary General
Financial committee	In charge of the financial control of the Association <ul style="list-style-type: none">• The treasurer (chairperson) + 2 members

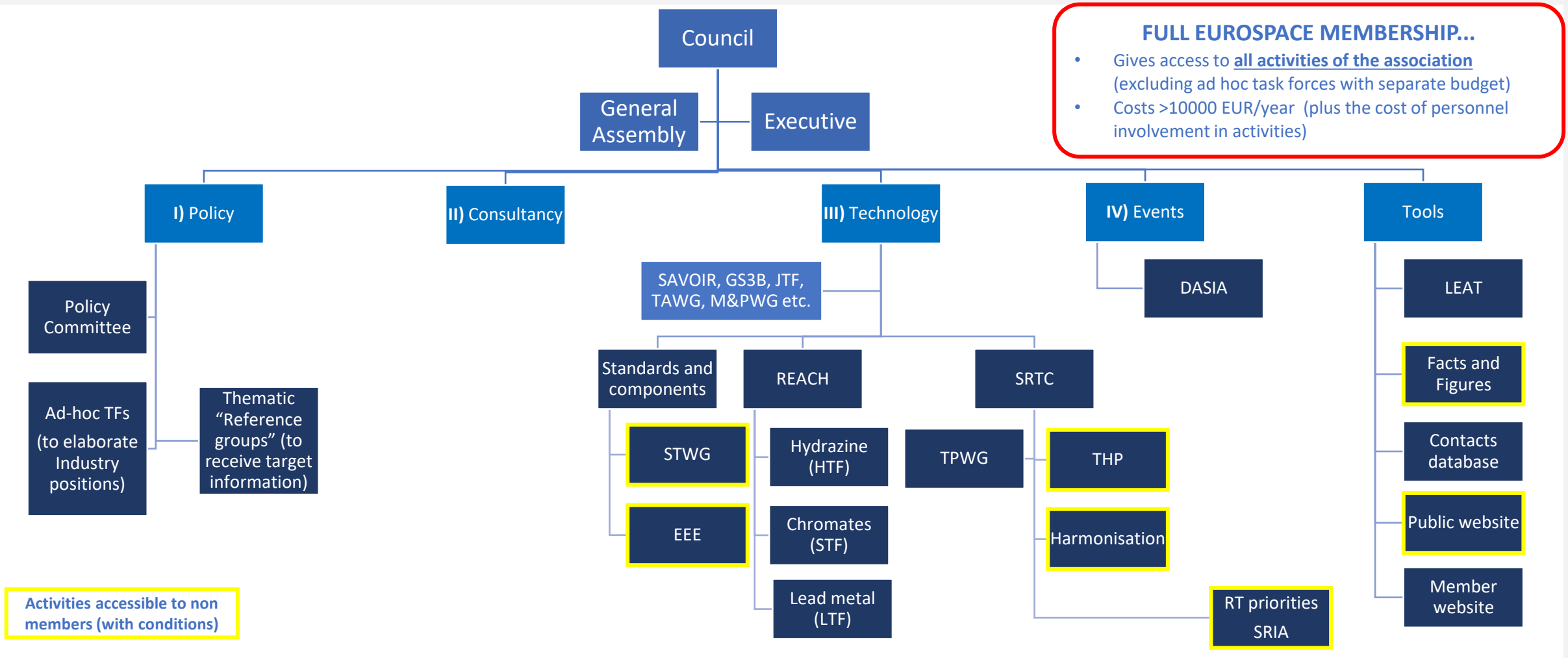
ASD-Eurospace Bodies in a nutshell (2/2)

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 & 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"> • They support the elaboration of consolidated industry viewpoints • 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, etc. <p>WG and TF: proactive bodies focusing on networking, information, and lobbying activities</p> <ul style="list-style-type: none"> • They tend to focus on policy and strategy aspects • Participation in working groups requires Eurospace membership 	<p>Panels: 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"> • They usually address technology related issues • Industry participation in Panels does not necessarily require membership in Eurospace.

Eurospace seeks consensus at each and every level of its action

A 4-Branch operational organisation



ASD-Eurospace Footprint in 2021

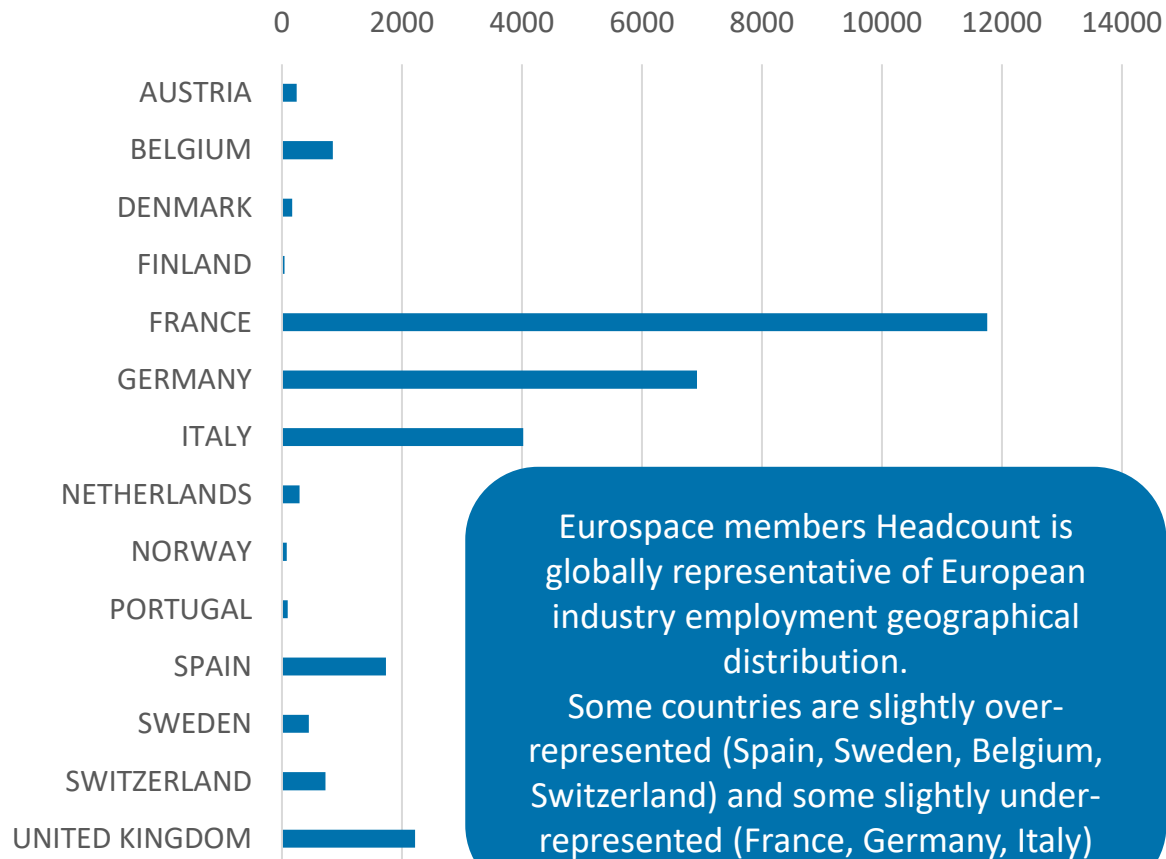


> 40 members in 14 European countries

- ADS (UK)
- AED Cluster Portugal
- AIR LIQUIDE
- Airbus Defence & Space Spain
- Airbus Defence and Space GmbH - Satellites
- Airbus Defence and Space Ltd (UK)
- Airbus Defence and Space Netherlands B.V.
- Airbus Defence and Space SAS - Satellites France
- Alter Technology
- APCO Technologies
- Ariane Group France
- Ariane Group Germany
- Arianespace
- Avio SpA
- AZUR Space Solar Power GmbH
- CGI/ SCISYS
- 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 AB
- Ruag Space Finland Oy Ag
- RUAG Space GmbH
- SABCA
- Safran Aircraft Engines
- Sener SA
- Sitael S.p.A.
- Telespazio
- Terma A/S
- Tesat Spacecom GmbH & Co. KG
- Thales Alenia Space Belgium
- Thales Alenia Space Espana SA
- Thales Alenia Space France
- Thales Alenia Space Italia SpA
- TNO
- TTTech
- Vitrociset SpA

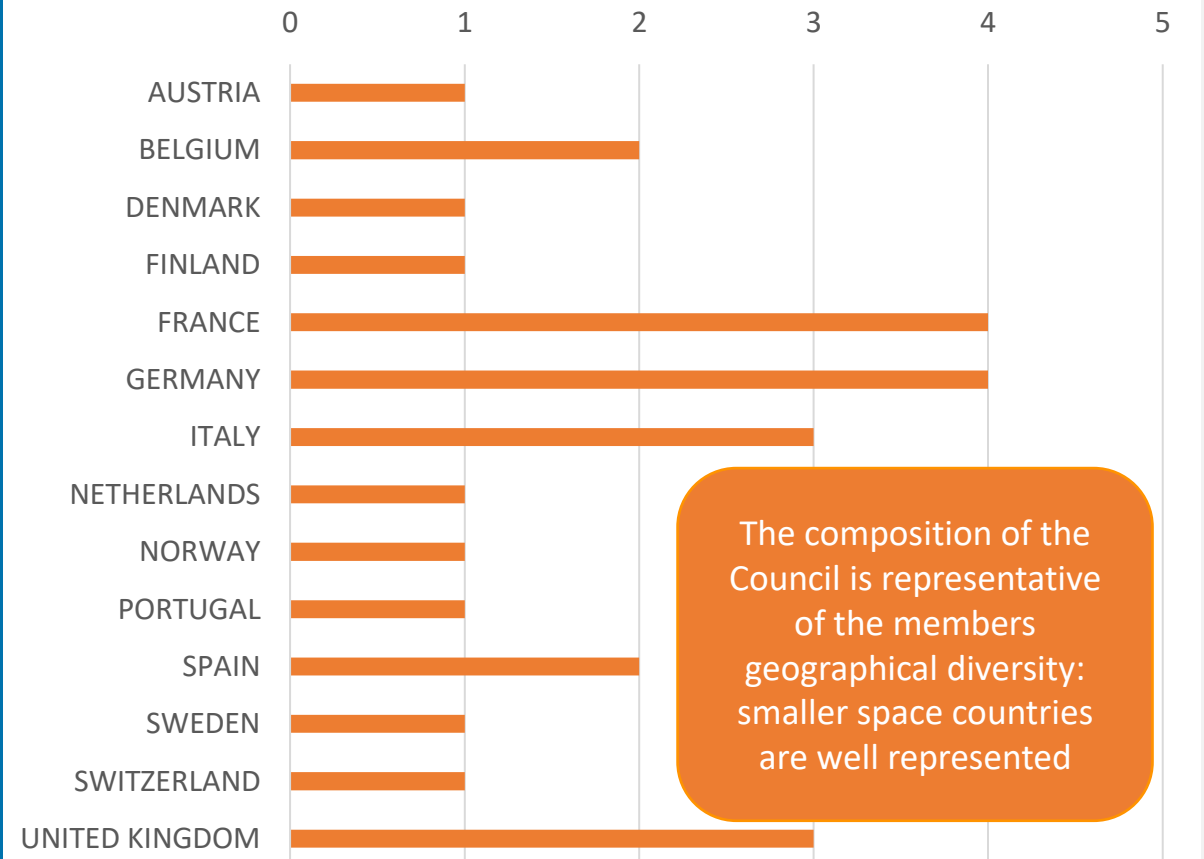
Membership status by country

Eurospace members Headcount by country



Eurospace members Headcount is globally representative of European industry employment geographical distribution. Some countries are slightly over-represented (Spain, Sweden, Belgium, Switzerland) and some slightly under-represented (France, Germany, Italy)

Eurospace council members by country



The composition of the Council is representative of the members geographical diversity: smaller space countries are well represented

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) – **new membership options have been defined in 2021, to accommodate smaller and medium companies and to enable group level membership.**
- Partial involvement as non members (ad hoc processes, free of charge and opt-in)
 - Involvement in ESA-coordinated formal consultations
 - Participation in the annual Eurospace facts and figures (F&F) survey
 - Involvement in specific industry driven working groups and task forces (REACH, ECSS, ESCC...)

How to be involved (Full membership – as of 01/01/2021)

"Legacy" membership

- Current
- **Accessible to members that wish to retain this scheme and new members**
- Formula:
 - 8500€ entry fee (inclusive of 100 space employees)
 - 20€ for each employee above 100

"Mid-size/midcap group" membership

- New
- **Accessible to all members with a European footprint, and less than 3000 space employees**
- Formula
 - 10000€ entry fee (inclusive of 250 employees)
 - 22€ for each employee above 250

"Large group" membership

- New
- **Accessible to all members with a European footprint, and 3000 space employees or more**
- Formula
 - 30000€ entry fee (inclusive of 750 employees)
 - 22€ for each employee above 750

"SME membership"

- New
- **Accessible to SMEs**
- Formula
 - 1500€ entry fee (inclusive of 30 employees)
 - 22€ for each employee above 30

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
- **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
- Policy and Economics 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 24th 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 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

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

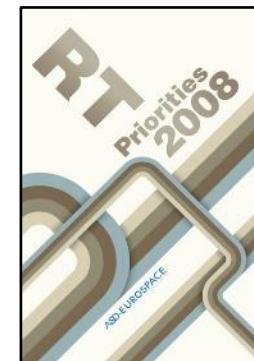
- The Task Forces
- The Strategic Research Agenda (RDT Priorities)
- The European Co-Programmed Partnership Preparation

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.

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