

# EUROSPACE

Organisation, activities & added value at your service

February 2022

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# Eurospace: our main features

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

- 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 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
    - Eurospace also selectively performs external contracts (ESA, EU, third-party organisations) – approx. 150-250k€
      - *Valorise Eurospace's expertise and create added-value to its members*
    - The membership fees paid by industry guarantee Eurospace independence of views
  - Eurospace resources cover salaries and the association's low operating costs (rent, travels etc.)
- Financial transparency
  - Annual accounts are certified by external auditors and published with the annual management report.
  - Eurospace is registered under ID [873508417106-05](#) on the EU Transparency Register

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

## Locations

### In Paris

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

22 Rue du Quatre Septembre  
F-75002 Paris

### In Brussels

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

100, rue du Trône  
B-1050 Brussels

## Executive Team

Secretary General:  
Olivier Lemaitre

Office and Conference  
Manager, Administrative  
Assistant:  
Nathalie Aleton

Research & Managing  
Director:  
Pierre Lionnet

Policy Manager:  
Charles Galland

Head Technology  
Strategy:  
Jean-Charles Treuet

Databases and Support  
to Standardisation:  
Angel Cuellar

# Eurospace 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 Financial Committee members
- All members are represented
- All 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 of Eurospace

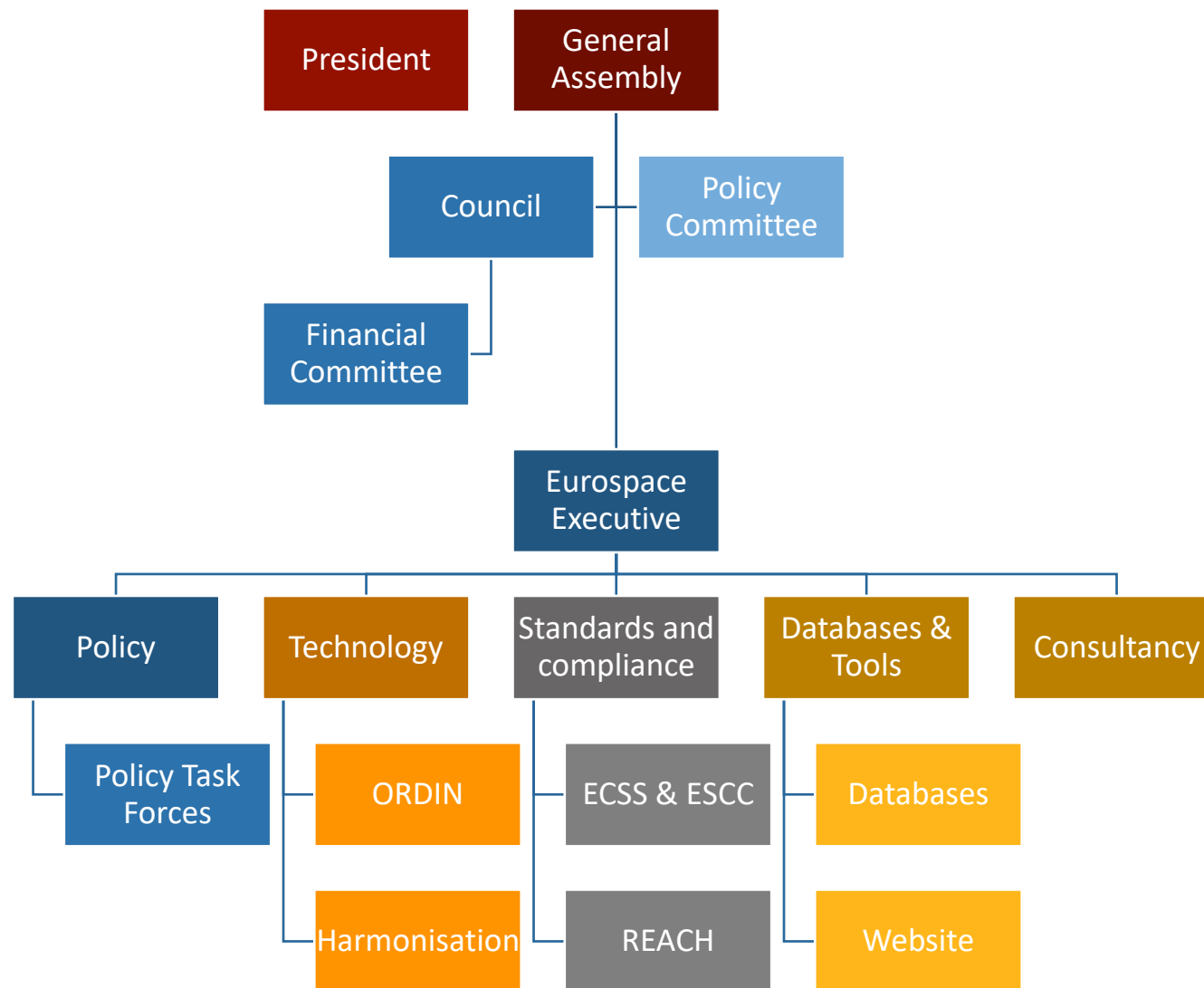
## Policy Committee

- Is the the advisory board to the Council
- Chaired by the Secretary General
- The role of the Policy Committee is to submit policy proposals to the Council and to take initiatives to promote and develop space activities
- 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

## Task Forces & Panels

- Created at the initiative of industry, task forces, working groups and panels are composed and chaired by industry representatives
- 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.)

# Organisation





# Eurospace members in 2022

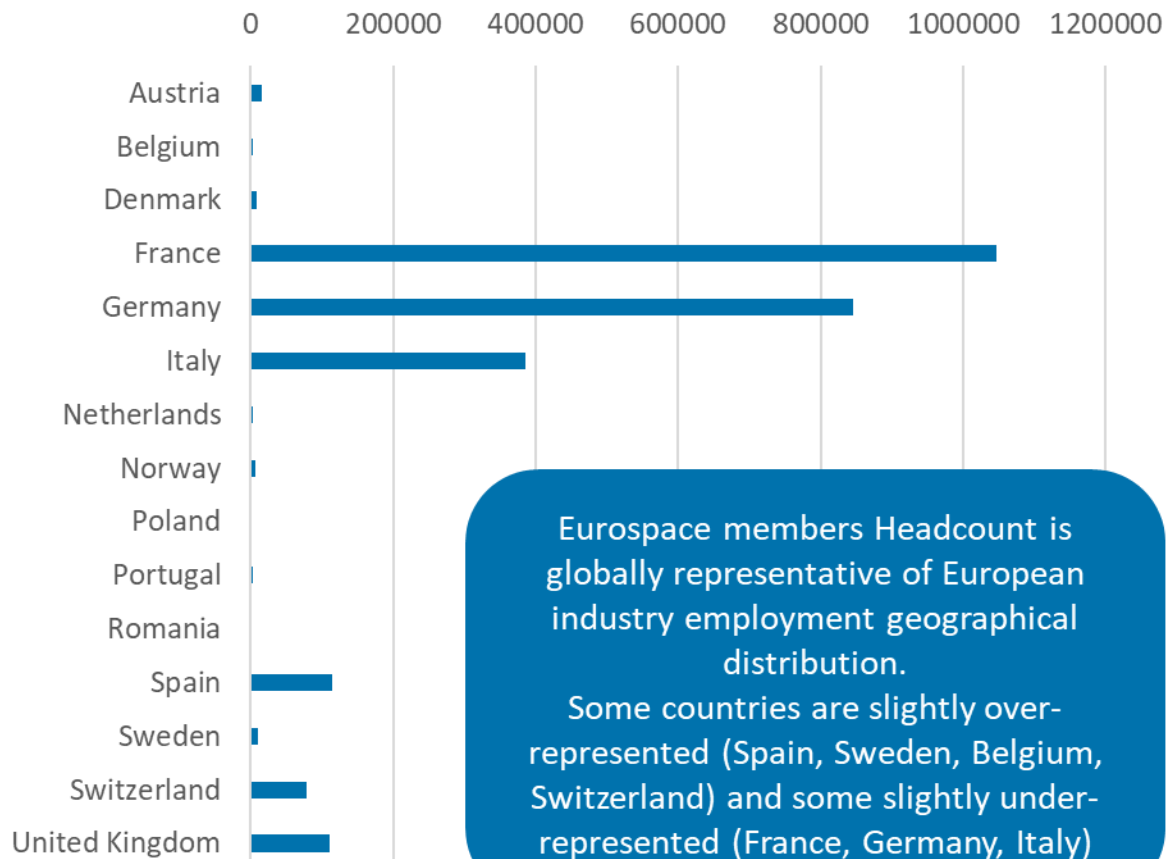
## More than 50 members in 15 European countries

- Eurospace member companies are European suppliers of space systems, software, and engineering services.
- They represent about 70% of European space industry employment
- For the latest status of our membership please refer to our [website](#)

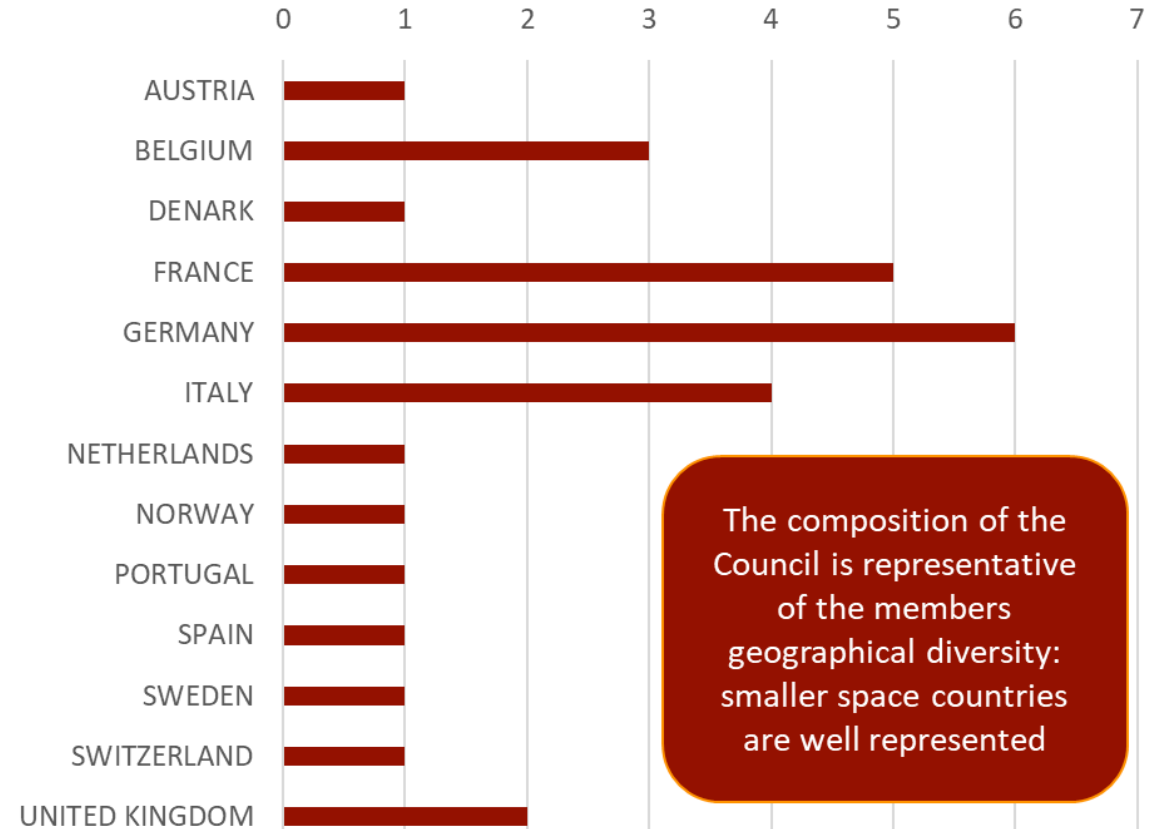


# Membership status by country

## Eurospace members Headcount by country



## Eurospace council members by country



# 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 two ways:
  - Full 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
      - *Members can join individually, but also as a group of affiliated entities*
      - *See Membership options presentation [document](#)*
  - 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

- Involvement in ESA-coordinated formal consultations
  - **ORDIN, 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 provides access to a free copy of the PDF report to respondents
  - 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

# Advocacy and policy watch



## Your 'pen'

- Contribution to the elaboration of Eurospace position papers, through Eurospace WG & TF or Policy Committee
  - E.g : Position Paper on Space Traffic Management (STM): An opportunity to seize for the European space sector (2020)
- 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 'eyes'

- 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 (e.g : Copernicus LTS, EDF draft WP, draft versions of the EU space programme regulation...)
- Most of the time original/full documents + highlights and commentary



# Resources and information



## Monthly newsletter

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



## Briefings, information notes and opinion papers

- EU Policy and programmes
- ESA policy and programmes
- Space economics



## Data and analytics

- LEAT database of launch events
- Eurospace facts and figures: the European space manufacturing sector model
- European space budgets consolidation
- Newspace observatory

# 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 recognised 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

# Eurospace facts & figures

*Annual survey of European space industry sales and employment*

# Facts and Figures – Eurospace Annual survey

- 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 25th edition of our annual survey of European Space Industry activity with data updated to 2020 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*

*Open Research Development and Innovation Network (ORDIN)*

*The Strategic Research Agenda (RDT Priorities)*

*The European Co-Programmed Partnership Preparation*

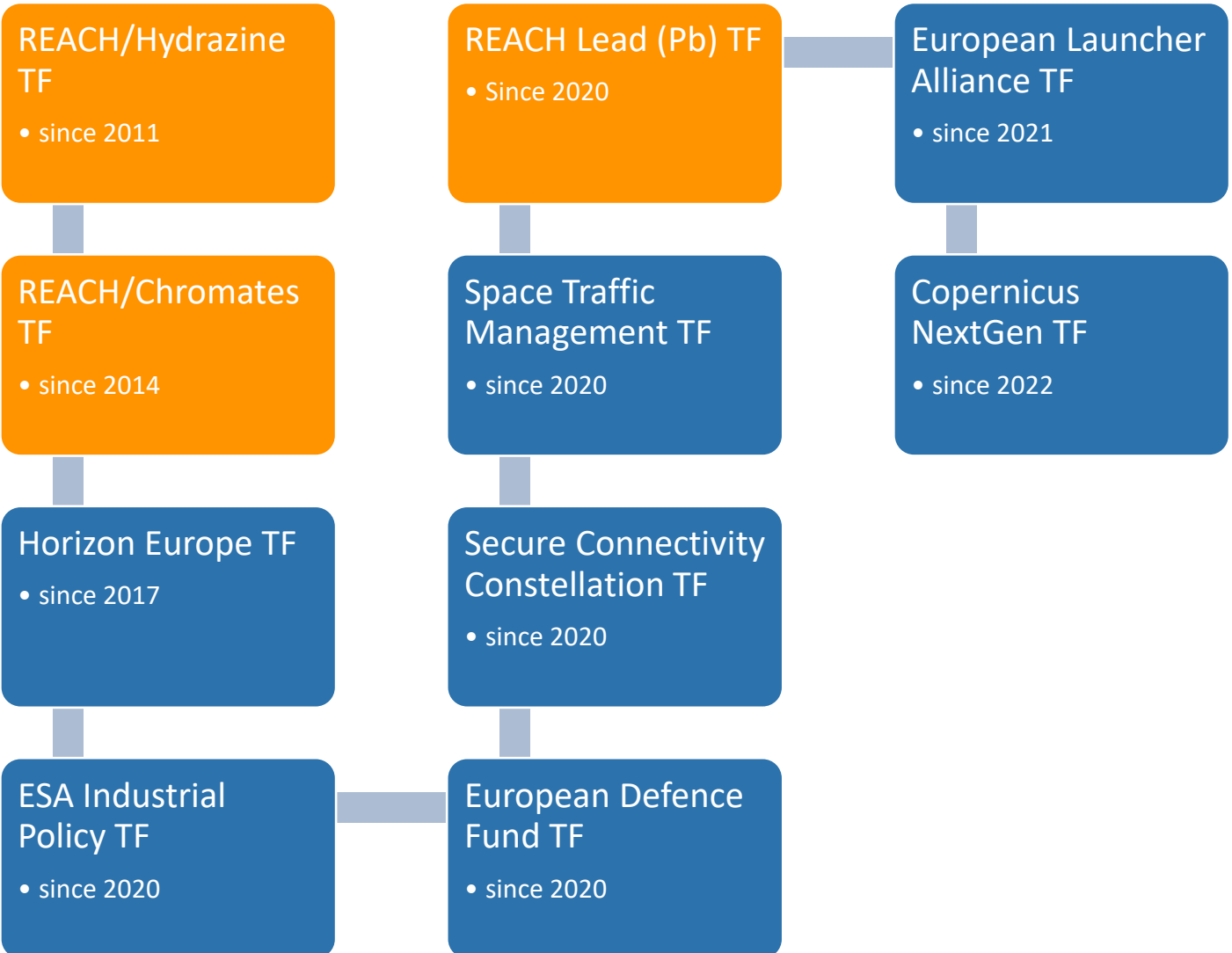
# Currently active Task Forces

Eurospace sets up ad hoc task forces to address short-medium term issues in a coordinated way with relevant industry stakeholder

- Task Forces usually have a limited duration in time and well-defined targets

Each TF is set-up with a specific mandate and TF agreement

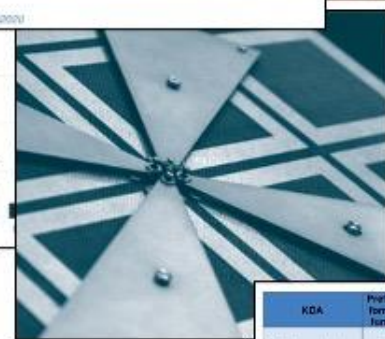
- Some TF are open **to non-members**
- In rare occasion, a TF can require a dedicated budget to perform its work
  - in this case it calls upon its members to provide the funding. The funding split and rules are defined in the TF agreement.



# Eurospace – >20 years of technology strategy actions

The collage features several key documents:

- ASD-EUROSPACE Keeping the European space sector at the leading edge:** A report discussing the competitive landscape of the space sector and the need for a game-changing budget for Space Horizon Europe.
- STEP INPUTS FOR THE SRIA FOR HORIZON EUROPE SPACE TECHNOLOGIES:** A high-level summary and recommendations for the ASI-scale SRIA for Horizon Europe (Space Technologies).
- CONFIDENTIAL ASD-EUROSPACE Structure Science:** A document detailing the state of the art in instruments, structures, and materials for large optical structures and mirrors.
- Work Plan for HORIZON EUROPE:** A detailed timeline from 2020 to 2028, showing various work programs (1st, 2nd, 3rd) and their associated milestones and funding.
- RT Priorities 2012:** A document focusing on Real Time (RT) priorities in the space sector.
- SPACE RDT PRIORITIES 2020:** A document outlining the incremental roadmap of technology research and development activities for space.
- Earth Observation and Telecommunications sections:** Detailed project descriptions for various space technologies, including payloads, enabling technologies, and readiness targets.



KDA	Preferred forms of funding	Preferred implementation mechanisms	Budget Period (M€)		
			2021-2022	2023-2024	2025-2026
Robotic manipulation	Grants	Flagship based approach KDA proposed in potential SRIA	8	6	16
Reducing interactions for life extension	Grants	Flagship based approach KDA proposed in potential SRIA	3	3	4
In-space robotic assembly: repair of existing	Grants	Flagship based approach KDA proposed in potential SRIA	4	4	8
Active Debris Removal	Grants	Flagship based approach KDA proposed in potential SRIA	10	15	15
On-orbit servicing demonstration	Grants	Flagship based approach KDA proposed in potential SRIA	26	20	36

Competition European Partnership based on 1000 proposal per 100 M€	
Phase:	1000 proposals
Type of agreement:	4000 proposals (1000 proposals per 100 M€)
Phase:	1000 proposals
Phase:	1000 proposals

# ORDIN: open research and innovation network

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

Why	Who	How	What	Added value
<ul style="list-style-type: none"><li>• <b>Build Technology Plans</b></li><li>• streamline and <b>enhance the supply chain capacity to formulate clear and comprehensive recommendations for future R&amp;D</b> and innovation programmes to ESA and the EU, in time and with the appropriate level of detail</li></ul>	<ul style="list-style-type: none"><li>• a process <b>open to ALL the supply chain</b>:</li><li>• RTOs, SMEs, newspace/emerging players, midcaps and large groups, primes and equipment suppliers, labs and reserach entities.</li></ul>	<ul style="list-style-type: none"><li>• a <b>workshop-based approach</b></li><li>• to collect information on stakeholders, state-of-the-art, technology trends, requirements, challenges and drivers. Workshops are open, free, and voluntary</li></ul>	<ul style="list-style-type: none"><li>• a <b>development plan and requirements database</b></li><li>• a supply chain owned <b>repository of technology requirements, capabilities, roadmaps and trends</b> supports the formulation of recommendations as required, on-time, and under stakeholder control</li></ul>	<ul style="list-style-type: none"><li>• supply chain <b>cohesion</b>,</li><li>• bottom-up/top-down technology <b>strategy</b>,</li><li>• improved <b>communication</b> with European institutions,</li><li>• a <b>globaly enhanced end-to-end European space technology strategy</b></li></ul>

# Space RDT Priorities – The Space sector 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



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