



2022 MANAGEMENT REPORT

PRESENTED TO THE GENERAL ASSEMBLY IN JUNE 2023

About Eurospace	4
The Year in review	5
Advocacy	5
<i>The 2022 political agenda</i>	<i>5</i>
<i>The 2023 political agenda</i>	<i>6</i>
Communication and outreach.....	7
<i>Events.....</i>	<i>7</i>
<i>Official letters</i>	<i>7</i>
<i>Newsletter activity</i>	<i>8</i>
<i>Website and social media.....</i>	<i>8</i>
<i>Outreach (Conferences/Speeches/Lectures/Articles/Press&Media).....</i>	<i>9</i>
Intelligence/Think Tank.....	12
<i>Political watch.....</i>	<i>12</i>
<i>Space Economics</i>	<i>13</i>
Industry cohesion.....	16
<i>Policy Committee</i>	<i>16</i>
<i>Task forces and active panels.....</i>	<i>16</i>
<i>REACH.....</i>	<i>22</i>
<i>Relations with other associations.....</i>	<i>23</i>
Contracts and own revenue	24
<i>DASIA conference.....</i>	<i>24</i>
<i>EPIC and EPIC 2 (H2020 Grant).....</i>	<i>25</i>
<i>EU Action 10.....</i>	<i>25</i>
<i>ECSS support (ESA Contract).....</i>	<i>27</i>
<i>GIFAS Facts & Figures.....</i>	<i>28</i>
<i>Data licensing</i>	<i>28</i>
<i>ESA-Industry Seminar on the "Future of ESA Earth Observation Programmes".....</i>	<i>28</i>
Internal affairs	29
Eurospace President and Council.....	29
Membership update	29
<i>New members.....</i>	<i>29</i>
<i>Members restructuring.....</i>	<i>30</i>
<i>Members resigning.....</i>	<i>30</i>
<i>Membership options</i>	<i>30</i>
Personnel in 2022	31
<i>Permanent team members.....</i>	<i>31</i>
<i>Temporary team members</i>	<i>31</i>
<i>Transparency disclosures.....</i>	<i>31</i>
Other internal matters	32
<i>Human resources budget evolution.....</i>	<i>32</i>
Summary financial report.....	33
<i>2022 Accounts closure.....</i>	<i>33</i>
<i>Simplified financial statements 2018 to 2022.....</i>	<i>35</i>
List of attachments	36
Financial Committee	36

Position papers issued	36
Official letters sent.....	36
Information notes and Briefings produced.....	36
Annex - Eurospace Council And Membership - December 2022	39
Eurospace Council status	39
Eurospace Policy Committee status	40
Eurospace Members status	41
Annex - FinCom report	44
Summary financial report.....	44
<i>FinCom recommendations to Council and General assembly.....</i>	<i>44</i>
2022 Accounts closure.....	45
Financial Prospects.....	46
<i>Simplified financial statements 2018 to 2025.....</i>	<i>47</i>
<i>Budget and equity forecast.....</i>	<i>48</i>
Annex - Human Resources budget evolution	50
Current situation	50
Workforce objectives.....	50
Updated Budget projections	50
<i>Assumptions</i>	<i>50</i>
<i>Workforce Budget projections</i>	<i>51</i>
<i>Financing plan.....</i>	<i>51</i>
<i>Implementation</i>	<i>52</i>

About Eurospace

Eurospace is a non-profit association incorporated under the French law, created in 1961, fosters the development of space activities in Europe and promotes a better understanding of space industry related issues and problems. Its 81 members are the main space industry manufacturers and launch service providers, they cover the whole span of the space industrial chain, are present in all major European space countries and represent more than 90% of the European space manufacturing business in Europe.

Eurospace, within its mandate, supports the understanding and knowledge of European space industry and structures, it promotes coordination of industry views and the expression of consistent messages towards European policy makers covering key topics such as space policy, space markets, space research, technology and innovation, space standards and space industry compliance to European regulations.

Eurospace is a recognised interlocutor to the European Space Agency, and the European Union. As an active participant to European industry consultations on space, Eurospace provides data, analysis and assessments on space industry related issues. Having established independent capabilities for space markets and policy assessment, and in particular with the Eurospace facts and figures annual survey of European space industry activity, Eurospace is a reference source for space industry information.

Since 2004, Eurospace is the Space Group of ASD, where it represents and defines the space viewpoint of the association.

Eurospace has offices in Paris (Headquarters) and Brussels (within ASD).

The Year in review

Advocacy

The 2022 political agenda

In all logic, the geopolitical context as well as the political and programmatic agenda of the European Union and of the European Space Agency shaped Eurospace's work in 2022.

No less than three Position Papers and two Reaction Papers covering the fields of Inflation, Copernicus, Space Traffic Management, Secure Connectivity, and Security & Defence) have been published. Once again, it highlights the dynamism and efficiency of Eurospace Task Forces in producing common and overarching positions in a few months.

At EU level, in February 2022, the European Commission officially published mid-February its so-called "Space Package". By tabling two initiatives - a proposal for a Regulation on a space-based secure connectivity and a Joint Communication on an EU approach on Space Traffic Management (STM) – the European Commission offered a coordinated response to the challenges of safeguarding the efficiency and security of our current assets while developing European cutting-edge space technology to the benefit of European citizens and economy. Eurospace was very quick in providing its official reaction with two forward-looking Reaction Papers published at the end of March and beginning of April.

On Earth Observation, beyond the organisation in April of an ESA-Industry Seminar on the "Future of ESA Earth Observation Programmes", Eurospace published a new Position Paper reflecting about the evolution of the Copernicus Programme, in a context where Commissioner Breton noted that the current context is requiring a thorough reflexion about the evolution of Copernicus, to address both the increased pressure from the market and the development of new technologies, as well as the new needs in a dramatically changing new geostrategic and environmental context

Latest addition to the family in 2022, the "Industry contribution to the future EU Space Strategy for Security & Defence" is the direct contribution of the European space industry to the preparation by the European Commission and the European External Action Service of their Joint Communication on an EU Space Strategy for Security and Defence, expected for Q2 2023. The European space industry, at the demand of the European Commission, was fully mobilised to support the initiative with its long-standing expertise in the provision of infrastructures and services of "dual use" nature and proposed possible ways forward to improve our technological non-dependency and the contribution of space to European defence capabilities, enhance the resilience of European space assets, and prevent the proliferation of sensitive technologies and capabilities.

At ESA level, the ESA Council of Ministers represented another key milestone for the future competitiveness of the European space industry. In this light, in a letter addressed to ESA Member States Ministers in charge of Space Affairs, Eurospace members expressed all their support to the new package of programmes that ESA presented in November to its Member States and help Europe move forward in difficult political and economic times via substantial financial commitments. The letter also insists on the issue of hyperinflation and the necessity to quickly find mitigation measures; a key concern that is largely developed in our Position Paper "Mitigate the costs of inflation to sustain the competitiveness of the European space supply chain" which promotes the investigation of suitable avenues to mitigate the effects of inflation and preserve the durability and competitiveness of the European space supply chain.

Finally, in the frame of ORDIN (Open Research, Development and Innovation Network), Eurospace's technology strategy initiative, six Workshops were held in 2022. Participation was very high encompassing the whole spectrum of the European space sector: from SMEs to primes, from Industry and RTOs to Universities, and from Eurospace members to non-members (about 50% of the participants are newcomers to Eurospace). In total, almost 200 experts belonging to 50 entities from 17 European cooperation states have joined the discussions, reinforcing our commitment to allow all industry (large and small) to exchange priorities and gather key trends and needs in R&I in a swift and affordable process.

The 2023 political agenda

Eurospace's work perspectives for 2023 are looking bright.

It starts with pursuing our efforts to accompany the initiatives that have recently been launched at EU level.

- Formally adopted at EU level at the beginning of 2023, IRIS² tendering activities started mid-March with the European space industry now fully focused on a single objective: to deliver;
- Reflections about Copernicus evolution around an Earth Observation governmental service, for which Eurospace provided our institutional partners with recommendation in our 2022 Position Paper, will take increasing importance in 2023 as the European Commission will work towards the gradual set-up of a new Copernicus governmental service in the frame of a pilot project (announced as part of the EU Space Strategy for Security & Defence);
- Regarding ESA's industrial policy, after having been very active on the profitability and inflation front in 2022, 2023 will aim at consolidating the competitiveness of the European space industry while finding solutions to simplify the ESA procurement process, often judged too cumbersome and resources-consuming by industry;
- Finally, the establishment of the long-awaited Co-Programmed Partnership for global competitive space systems in the frame of Horizon Europe will officially grant industry with a role in the definition of its priorities for R&D.

It continues with the launch of new initiatives that will define the European space sector in the future.

- On March 10th 2023, the publication by the European Commission and the European External Action Service of the "EU Space Strategy for Security & Defence" represented a major and positive event for the sector as it has always been crucial to make Europe a real (unified) space power. In this respect, Eurospace will bring its support to the EU institutions by providing recommendations on the implementation of the Strategy;
- Also announced in the Strategy, the EU will work towards tabling an EU Space Law that would encompass the safety, security and sustainability aspects. Very active on the topic of Space Traffic Management since a couple years already, Eurospace will without a doubt be at the forefront of the discussions with the hope that the efforts of the EU Member States will be strongly coordinated at EU level in support of the objective of increased European strategic autonomy (and possibly preparing the way for a capability at EU level fully leveraging industrial capabilities and service offerings);

On the industrial side, European institutional actors, and the Commission in particular, have expressed since a few years the political will to "modernise the space sector", with the objective to promote also in Europe the effects induced by new approaches to commercialisation, innovative procurement and industrialisation observed originally in the US. This willingness was expressed in the "EU Space Strategy" in 2016, which declared that the Commission will be "encouraging the development of commercial markets for new space activities", and in ESA Agenda 2025 itself, which calls for "boosting disruptive innovation in emerging commercial space domains". In this context, Eurospace will contribute to these reflexions with

recommendations to provide consensual recommendations to help framing European public institutions' vision and perspective with regard to new industrial and commercial approaches (building on what is often referred to as the "Newspace" or "Space Commercialisation").

In terms of advocacy, beyond further efforts to be deployed to continue to bridge knowledgeability gap about the space sector (economics, challenges, international situation...) at EU and ESA levels, the support from Eurospace members to raise awareness at national level about the importance of a strong and efficient European space policy will be key; as Eurospace's increased involvement in the organisation of events aiming at promoting a mutual understanding of industrial and institutional ambitions and constraints in space.

Communication and outreach

Events

Eurospace has a recognised capacity to organise and support the organisation of events aiming at creating cohesion and momentum in the European space sector.

In 2022, the following events were organised, co-organised or sponsored by Eurospace:

- **14th European Space Conference (BBE)**
 - 25-26 January 2022 – Event sponsored by Eurospace
- **ESA-Industry Seminar on the "Future of ESA Earth Observation programmes"**
 - 12-13 April 2022 – Webex event, invitation only – full organisation by Eurospace & EARSC, on behalf and with the active participation of ESA, >300 participants >50 panellists and speakers
- **DASIA 2022**
 - 17-18-19 May 2022 - online event fully organised by Eurospace – 100 participants
- **Eurospace 2022 Facts & Figures Press Release Presentation**
 - 13 July 2022 – online press conference fully organised by Eurospace
- **European Space Forum**
 - 25-26 October 2022 – hybrid event co-organised with, and sponsored by, Eurospace – 700 participants
- **Eurospace Webinar on Space economy**
 - 15 November 2022 – Webex event organised by Eurospace for Eurospace members
- **ORDIN workshops on technology strategy**
 - 8-9-10-17-18 November 2022 – Webex events, open only to industry stakeholders – full organisation by Eurospace – 200 participants
- **STWG Workshop – ECSS Industrialisation Branch**
 - 22 November 2022 - Webex event fully organised by Eurospace – 155 participants across 18 companies

Official letters

Whenever the policy agenda requires it, official Eurospace letters are transmitted to our institutional partners in the European Commission and in the European Space Agency to support our political agenda. In 2022, five formal letters were sent by Eurospace.

- Letter from Eurospace President André-Hubert Roussel to Director General DG DEFIS Timo Pesonen and to Director General Josef Aschbacher to accompany the release of the Eurospace survey on the impact assessment of the Ukraine crisis on the European space industry - 19/04/2022

- Letter from Eurospace President André-Hubert Roussel & Eurospace 5 VPs to ESA Member States Ministers in charge of Space Affairs to support the new package of programmes that ESA will present in November to its Member States and help Europe move forward in difficult political and economic times via substantial financial commitments – 02/09/2022
- Joint Letter from Eurospace, SME4SPACE, ESRE, EARTO, EASN in response to Ekaterini Kavnada (DG DEFIS) letter announcing the support of the European Commission with the set-up of a new CSA using the lump sum approach – 08/09/2022
- Letter from Eurospace President André-Hubert Roussel to MEP Christophe Grudler to congratulate him for the adoption of IRIS² in the European Parliament – 22/11/2022
- Letter from Eurospace President André-Hubert Roussel to HR/VP Josep Borrell, Commissioner Thierry Breton and Director General Timo Pesonen, to accompany the Eurospace Position Paper “Industry Contribution to the future EU Space Strategy for Security and Defence” – 12/12/2022

Newsletter activity

The Eurospace newsletter is prepared by Eurospace executive for its members. It aims at giving an overview of all ongoing activities at Eurospace and a political watch of the European space sector. In 2022, eleven Eurospace Newsletters were distributed to the members.

Note that all editions of the Newsletter are available as annexes to this report (members only).

Website and social media

The Eurospace Website and social media accounts (LinkedIn, Twitter) are key to improve the impact of our actions both in the press and on social media.

The Eurospace Website, redesigned in 2022, allows for each visitor to have access to all Eurospace public activities (i.e., general information about Eurospace, news, working bodies, published documents including Position Papers).

In 2022:

- 20 News were published
- 3 Position Papers and 2 Reaction Papers were published
 - Eurospace Reaction Paper “Reaction of Eurospace about the Proposal for a Regulation establishing the Union Secure Connectivity Programme” – 25/03/2022
 - Eurospace Reaction Paper “Reaction of Eurospace about the Joint Communication “An EU approach for STM”” – 05/04/2022
 - Eurospace Position Paper “Mitigate the costs of inflation to sustain the competitiveness of the European space supply chain” - 05/09/2022
 - Eurospace Position Paper “Copernicus: how to further enhance the impact of a world-class programme” – 23/09/2022
 - Eurospace Position Paper “Industry Contribution to the future EU Space Strategy for Security and Defence” – 12/12/2022
- The Facts&Figures Press Release 2022 was published in July 2022

The table below allows to see how many times a Position Paper has been downloaded on the Eurospace website:

Document	Number of downloads (on Eurospace website)
Eurospace Reaction Paper “Reaction of Eurospace about the Proposal for a Regulation establishing the Union Secure Connectivity Programme”	312
Eurospace Reaction Paper “Reaction of Eurospace about the Joint Communication “An EU approach for STM””	311
Eurospace Position Paper “Mitigate the costs of inflation to sustain the competitiveness of the European space supply chain”	774
Eurospace Position Paper “Copernicus: how to further enhance the impact of a world-class programme”	241
Eurospace Position Paper “Industry Contribution to the future EU Space Strategy for Security and Defence”	Not published given the criticality of defence-related proposals expressed in the Paper
Facts&Figures Press Release 2022	1236

ASD-Eurospace is also active on LinkedIn¹ with an account totalling 1200 followers at the end of 2022 (800 followers in December 2021). Within a year, 60 LinkedIn posts were created, 2500 clicks on attachments (most of them being linked to Eurospace’s website News), 34000 impressions (i.e., the number of times a post was shown to LinkedIn users), 125 republications of the content and 800 “likes”. More particularly, posts that rather share Eurospace positions than just factual news are particularly followed. The ASD-Eurospace LinkedIn account is also complemented by personal accounts from its employees, relaying Eurospace key positions. In particular, Secretary General Olivier Lemaitre and Research & Managing Director Pierre Lionnet both rely on an audience of more than 500 relations each.

- **Linkedin accounts**

- <https://www.linkedin.com/company/asd-eurospace/>
- <https://www.linkedin.com/in/olivier-lemaitre-b4ab62/>
- <https://www.linkedin.com/in/eurospacepierreionnet/>

In the same sense, the ASD-Eurospace Twitter account² counted almost 578 followers at the end of 2022 (400 followers at the end of 2021) - among which Members of the European Parliament, officials from the European institutions and European Space Agency, influential journalists etc. Within the year, 37 Official Tweets were posted.

- **Twitter handle**

- @ASD-Eurospace

Outreach (Conferences/Speeches/Lectures/Articles/Press&Media)

This lists only includes active speaking engagements, not mere attendance.

President

- 14th European Space Conference 2022 (25/01/2022) – Organised by Business Bridge Europe
- ASTERX 2022 Training Exercise for Space Operations - Senior Visitors Day (04/03/2022) - Organised by the FR Ministry for the Armed Forces

¹ <https://www.linkedin.com/company/asd-eurospace/>

² <https://twitter.com/ASDEurospace>

- European Space Forum 2022 “Embracing a new era for Space in Europe” (25-26/10/2022) – Organised by Forum Europe

Secretary General

- Accelerator Rapid and Resilient Crisis Response - Stakeholder Workshop (14/01/2022) – Organised by ESA and ESPI
- Copernicus Horizon 2035 colloquium (16/02/2022) - Organised by the FR Presidency of the Council of the EU
- European Union Industry and Start-ups Forum on Space Traffic Management (26/04/2022) - Organised by the European Commission and EU SST
- Space collaboration between the EU and Canada: projects and perspectives (03/05/2022) – Organised by the European Union Chamber of Commerce in Canada (EUCCAN)
- Annual Reception of DLR (14/06/2022) – Organised by the German Aerospace Center (DLR) and the State of Baden-Württemberg
- European People’s Party Group meeting: “Can Europe take the lead in space?” (15/06/2022) – Organised by the European Parliament’s EPP Group
- Sky & Space Intergroup: towards a united EU voice on Space Traffic Management (21/06/2022) – Organised by the European Parliament’s Sky & Space Intergroup
- Launch event of the European Centre for Space Economy and Commerce (4/07/2022) – Organised by ESA and ESPI
- European Parliament ambitions for the the Connectivity satellites (11/07/2022) – Organised by MEP C. Grudler, Rapporteur on the Secure Connectivity Regulation
- ESA High-Level Forum with Industry (06/09/2022) – Organised by ESA
- High-Level Workshop on “New Frontiers in EU Space Governance: Sustainability, Safety and Security” (23/09/2022) – Organised by the Leuven Centre for Global Governance Studies
- EU Space Programme: key contribution to sustainability and growth (27/09/2022) – Organised by the Permanent Representation of the Czech Republic to the EU
- Export Club Lithuania (28/09/2022) – Organised by the Lithuanian Innovation Agency
- 16th ESPI Autumn Conference (11-12/10/2022) – Organised by ESPI
- European Space Forum 2022 “Embracing a new era for Space in Europe” (25-26/10/2022) – Organised by Forum Europe
- Policy Dinner on Space Traffic Management (09/11/2022) – Organised by Friends of Europe
- ASD Defence Business Unit (10/11/2022) – Organised by ASD
- Industrial policy and the space industry in Europe (17/11/2022) – Organised by the Bruegel Institute
- Masterclass on European lobbying methods (14/12/2022) – Organised by Eurospace

Team

Pierre Lionnet

- Living Planet Symposium 2022 (24/05/2022) – Organised by the European Space Agency
- ESA Industrial Policy Evolution Working Group (IPE-WG) (06/07/2022) – Organised by ESA
- Eurospace Facts & Figures Report: Press Release presentation (13/07/2022) – Organised by Eurospace
- ESA 4th REACH Workshop (18/10/2022) – Organised by ESA
- European Space Forum 2022 “Embracing a new era for Space in Europe” (25-26/10/2022) – Organised by Forum Europe

- Overview of the European space market (25/11/2022) – Organised by the Lithuanian Innovation Agency
- IHEDN (Institut des hautes études de la défense nationale - 25/02/2022) - Panel on Space Economics
- IEP, Sciences-Po Paris (08/09/2022) - Space economics lecture
- Contacts with the Media: with published quotes
 - Challenges - France - https://www.challenges.fr/entreprise/starship-starlink-spacex-un-champion-sur-une-orbite-instable_797503
 - Idnes - Czech Republic - https://www.idnes.cz/technet/vesmir/starlink-vesmir-druzice-internet-spacex.A220128_142511_tec_vesmir_vse
 - 20 Minutes - France - <https://www.20minutes.fr/economie/2982831-20210222-perseverance-mars-peut-doit-parler-rentabilite-economique-conquete-spatiale>
 - Naukas Blog - Spain - <https://danielmarin.naukas.com/2022/03/23/lanzamiento-y-acoplamiento-de-la-soyuz-ms-21/>
 - Naukas Blog - Spain - <https://danielmarin.naukas.com/2022/04/06/los-contratos-del-siglo-para-lanzar-la-megaconstelacion-kuiper-de-amazon/>
 - Capital - France - <https://www.capital.fr/entreprises-marches/internet-par-satellites-leurope-a-la-technologie-pour-concurrer-elon-musk-1435648>
 - Les Echos - France - <https://www.lesechos.fr/industrie-services/air-defense/la-conquete-de-lespace-profite-a-la-balance-commerciale-de-leurope-1319598>
 - Science Business - Belgium - <https://sciencebusiness.net/news/industry-sees-scaled-down-horizon-europe-space-partnership-missed-opportunity>
 - Science Business - Belgium - <https://sciencebusiness.net/news/space-partnership-disarray-after-member-states-slash-budget-eu14b-eu250m>
 - Challenges - France - https://www.challenges.fr/entreprise/retards-du-lanceur-geant-starship-spacex-risque-t-il-vraiment-la-faillite_791375
 - The Telegraph - UK - <https://www.telegraph.co.uk/business/2021/12/11/elon-musk-turns-heat-stop-spacex-burning-cash/>
 - Science Business - Belgium - <https://sciencebusiness.net/news/industry-laments-lack-clarity-eus-new-eu24b-satellite-programme>
- Contacts with the media: without quotes
 - Wall Street Journal
 - The Washington Post
 - The New York Time
 - The Financial Times

Charles Galland

- Accelerator PROTECT - Stakeholder Workshop (14/01/2022) – Organised by ESA and ESPI
- EU SST industry and start-ups workshop (17/02/2022) – Organised by EU SST Consortium
- New Space Economy European Expoforum (02/02/2022) – Organised by New Space Economy European Expoforum

Angel Cuellar

- History and future of the exploration of the Moon (class for primary school kids of around 10-12 years old) (05/05/2022) - Organised by the Colegio Internacional de Aravaca in Madrid
- “UK Space Command & USSF, and the history of when the US damaged an UK satellite with a nuclear test”- Article published in the Spanish space blog Fuera de Orbita (19/05/2022)

- “Spanish Air and Space Force?” - Article published in the Spanish space blog Fuera de Orbita (25/07/2022)

Intelligence/Think Tank

Political watch

Eurospace Executive regularly monitors EU regulatory and political activity and provides briefings and information notes to its members. They provide intelligence, analysis and/or opinions on arising themes at EU and ESA levels. In 2022, 66 key guidance documents were distributed throughout the year:

- Briefing – “The Connecting Europe Facility”
- Briefing – “NATO’s overarching Space Policy”
- Conference Report – “14th European Space Conference 2022”
- Briefing – “Proposal for a Regulation 'establishing the Union Secure Connectivity Programme for the period 2023-2027'”
- Briefing – “An EU Approach for STM”
- Briefing – “Commission contribution to European Defence”
- Briefing – “Communication: Roadmap on critical technologies for security and defence”
- Briefing – “EU Global Action on Space”
- Eurospace Report – “Space Summit 2022”
- Eurospace Report – “Copernicus Horizon 2035 Conference”
- Information Note – “SRC/PSA Status”
- Briefing – “Sanctions against Russia - Impacts on space”
- Briefing – “The future EU Space Strategy for Security & Defence”
- Briefing – “Strategic Compass for Security & Defence - relevance for the space sector”
- Briefing – “Sneak-peak preview - Versailles Declaration”
- Briefing – “HEU/Space draft WP 23-24 general comments”
- Briefing – “Presidency Draft Compromise: Secure Connectivity”
- Eurospace Report – “Hybrid event on STM with MEP Marinescu”
- Briefing – “33 minutes with Catherine Kavadia”
- Briefing – “Presidency Draft Compromise: Secure Connectivity”
- Briefing – “Presidency Draft Compromise: Secure Connectivity - MS Comments”
- Briefing – “Second Presidency Draft Compromise: Secure Connectivity – MS Comments”
- Briefing – “EARSC’s Earth Observation Café with Mauro Facchini”
- Eurospace Report – “Inaugural event of the European Industry and Start-ups Forum on STM (EISF)”
- Eurospace Report – “European Innovation Council Workshop: funding opportunities for space start-ups and SMEs”
- Briefing – “Joint Communication on the Defence Investment Gaps Analysis and Way Forward”
- Briefing – “Second annual Work Programme of the European Defence Fund (EDF)”
- Briefing – “Inflation and impact on Industry: setting the scene and initial discussions with ESA D/IPC”
- Briefing – “Evolution of Copernicus: key changes in ESA Long Term Scenario”
- Briefing – “ESA Programme Related to EU Secure Connectivity”
- Briefing – “Motion for a Resolution on Space Traffic Management”
- Information Note – “ESA EO Programme Proposal for CM22”
- Eurospace Report – “ITRE Committee, exchange of views on Ukraine”
- Briefing – “ITRE Committee’s discussion on the draft Report on the Union Secure Connectivity Programme”

- Briefing – “June Competitiveness Council: interventions of Commissioner T. Breton”
- Briefing – “Version 3 of Draft Horizon Europe Workprogramme 23/24”
- Updated Briefing – “ESA Programme Related to EU Secure Connectivity”
- Eurospace Report – “European People’s Party Group meeting: can Europe take the lead in space?”
- Eurospace Report – “Sky & Space Intergroup: towards a united EU voice on Space Traffic Management”
- Briefing – “Towards a Copernicus governmental service”
- Briefing – “Opinion of the Committee on Budget on the proposal for a regulation establishing the Union Secure
- Briefing – “Regulation establishing the Union Secure Connectivity Programme: Council Conclusions compared to the Commission’s proposal”
- Briefing – “Proposal for a Directive of the European Parliament and of the Council “on the resilience of critical entities”
- Briefing – “Transition Pathways”
- Eurospace Report – “European Parliament ambitions for the Connectivity satellites”
- Briefing – “EARSC Position Paper: Industry view of the future of Copernicus, a comparison”
- Briefing – “ESA Programme related to EU secure connectivity”
- Briefing – “Draft joint understanding on secure connectivity”
- Briefing – “Finalisation of MEP Ch. Grudler draft report on Secure connectivity”
- Briefing – “Space Traffic Management in European Parliament’s draft report on Secure connectivity”
- Eurospace Launch Control Room #1 “Summary of main launch events between 01/07/2022 & 30/09/2022”
- Eurospace Conference Report “EU Space Forum 2022 - "Embracing a new era for Space in Europe" (25-26/10/2022)”
- Briefing – “ESA Programme Related to EU Secure Connectivity - October Update”
- Briefing – “European Parliament's Resolution on STM”
- Briefing – “Update on standards related to Space Traffic Management”
- Briefing – “Impact of inflation on CM22 proposals”
- Briefing – “Proposed programmes for CM22 + budgets”
- Briefing – “European Parliament’s ITRE Compromise on Secure Connectivity”
- Briefing – “Council Recommendation: resilience of critical infrastructure”
- Briefing – “ESA CM22 - Analysis of contributions to optional programmes”
- Briefing – “Joint Communication on the EU Policy on Cyber Defence”
- Briefing – “Recommendations of the New Space Advisory Board (NAB) to ESA DG”
- Briefing – “First progress report on the implementation of the action plan on synergies between civil defence and space industries”
- Briefing – “Horizontal part of the 2023-2024 Work Programmes of the Union Space Programme”
- Briefing – “ESA November Council: Oral point on inflation”
- Briefing – “ESA CM22 - Analysis of contributions to optional programmes”

Space Economics

Facts and figures

Every year Eurospace undertakes, with the participation of the companies in the sector the annual update of its facts & figures statistical series.

Created in 1996, and building on a consistent data set acquired since 1991, the statistical collection aims at measuring the value of space systems design, development and production activities as performed in Europe (i.e. the space industry manufacturing activity). Space systems are defined in detail in order to ensure an appropriate data collection and to avoid misinterpretation of the data sets.

This statistical effort is supported by two main driving principles:

- The focus on manufacturing activities (with the exclusion of all services related to the exploitation of space systems: launch services and satellite operations). Service activities associated to the manufacturing process of space systems (such as engineering and test services, consultancies etc.) are included in the perimeter of the survey. A share of ground systems operations is also included, when they are performed for Space agencies in Europe.
- The effort to measure the value of the end-market, with the elimination of all inter-sectoral business that could be counted twice or more.

Perimeter of the survey

The Eurospace facts & figures survey focuses on measuring the economic value of industrial activities associated to the design, development and manufacturing of space systems (also called the upstream sector) in Europe.

It does not consider non-space products (such as missiles or consumer-end terminals such as GPS receivers, Satellite TV receivers and dishes, etc.) nor the provision of services based on the exploitation of space assets. This means that the revenues and employment of such companies as Eutelsat, Paradigm, Inmarsat, Arianespace, SES Global, and other operators are not included in the perimeter of the survey.

The Eurospace facts & figures economic currently includes 458 space units.

Data Collection

The data collection is supported by companies with space manufacturing activities operating in Europe (not limited to Eurospace membership). Companies answer a questionnaire providing detailed information on their sales and employment relevant to space systems design, development and manufacturing. All information released to Eurospace is protected by a confidentiality agreement. The quality of the survey is only as good as the data provided by participating companies.

Most companies in the space manufacturing sector have participated at least once to Eurospace survey in the past. The main players (companies with more than 100 space employees) usually support the survey on a very regular basis, while smaller players may only support the survey sporadically. When a reply is missing from a company, it is supplemented by an estimate based on a previous reply received from that company, and/or publicly available information on the company.

The space manufacturing sector in Europe is at the same time very fragmented and very concentrated. The 30 largest space units in Europe make for almost 80% of total employment of the sector. The remaining smaller players representing barely 20% of employment. It is also interesting to note that all smaller players work almost exclusively as subcontractors to the largest players.

From a statistical point of view, this means that an efficient data collection shall focus on collecting at least the main replies (the large players, and particularly the prime contractors) that will provide a good assessment of final sales. Collecting additional replies from increasingly smaller players, adds a layer of detail to the survey

and improves marginally the measurement of employment; but does not affect the overall value of final sales and has a limited economic impact.

Consolidation Model

In the Space sector, as with many other industrial sectors, the delivery of a complex system involves the participation of a large number of companies at various stages of the development and production processes. This translates into a complex contractual chain, where one prime contractor signs with the customer and then divides the work among itself and many subcontractors.

When considering the revenues generated within the whole supply chain by the production of one space system, with the mechanism of subcontracts the cumulated value of all contracts exceeds the value of the system itself. This is due to the fact that without consolidation, some subcontracts are counted twice.

Within a given perimeter, the consolidation of sales can be done in two ways: either by measuring the consolidated sales at company level (total sales minus the value of subcontracts), either by measuring the final sales at company level (total sales minus inter-sector sales, relevant to subcontracted work). Within a given perimeter the value of consolidated sales and final sales are identical.

LEAT database

Like every year, the Launch Events Analysis Tool (LEAT) was updated with the launch events of the previous year. The LEAT database is complete with launch events since 1957, and provides independent assessment of space market metrics. The database tracks every satellite launched, with information on the launcher used (including technical details) and on the payloads launched, focusing on mission aspects, and customer/manufacturer aspects.

The LEAT database is a key reference for international comparisons and the building of political messages. It enabled in particular, the elaboration of key messages in 2022:

- Eurospace facts and figures Press release: offsetting international budget analysis with launch statistics
- Eurospace new publication “Launch Control Room”
- Trends in launcher cost per kg
- Trends in global space activity
- Introduction to space markets and economics: briefing to European MEPs
- Captive and open market dependence international comparison

European space budgets Monitoring

Eurospace executive maintains a budget watch, taking advantage of a variety of formal and informal sources and in depth understanding of budgetary processes in Europe. This budget watch enables the executive to perform an annual consolidation of European space budgets (bringing together the national, EU, ESA and Eumetsat budget in consistent way, as well as an in-depth analysis of the ESA budget (detailing contributions by source and outputs by programme).

Newspace observatory

Since 2014, Eurospace has developed an informal observatory of the New Space phenomenon. This analytical work is supported by an effort to characterise the New Space in a consistent way, and by an effort to track New

space 'relevant' companies. This effort has enabled Eurospace to extend its knowledge of the European space sector and to open the facts and figures survey to new players of significance. The analytical and factual approach also serves to support independent information of European institutions on the actual economic impact of the New Space in Europe and abroad.

Today Eurospace is believed to maintain a highly representative New Space company list with global coverage, counting near to 1300 entities in the manufacturing segment alone, including unipersonal units.

Industry cohesion

Policy Committee

The Policy Committee (PC) is formed by the Council and chaired by the Secretary General. This Committee is carrying out the tasks delegated by the Council, submitting policy proposals to the Council. It decides on initiatives to promote and develop space activities and to defend the common interests of the European space industry, on the basis of proposals by the Secretary General. The Members of the Committee also alert the Secretary General about issues for which an action of the Association would be deemed relevant, and give feed-back about the reaction of national authorities to the advocacy messages promoted by the Association towards European organisations.

In order to maximise the impact of Eurospace limited resources, the policy-related activities of the association (drafting position papers, elaborating advocacy campaigns...) are under the responsibility of the Policy Committee. Concretely, it means that issues that are deemed requiring an action of Eurospace are brought forward in the PC meetings, which then decides to set up a dedicated Task Force to deal with it (TF have a target focus and an expected output, a defined timeframe, and standard ToR where only calendar, objective/output and composition are adapted). Eurospace executive assessment of this process is very positive.

The Policy Committee meets physically or online each month. In 2022, the Policy Committee met on 01/02; 22/02; 29/03; 03/05; 31/05; 28/06; 30/08; 27/09; 24/10; 29/11; 20/12.

Task forces and active panels

POLICY TASK FORCES

Space Traffic Management TF

The Eurospace "Space Traffic Management (STM)" Task Force was created by Decision of Eurospace Policy Committee on November 13th 2019 and chaired by Mr Miguel Angel Molina (GMV).

The "Space Traffic Management (STM)" Task Force is established in view of consolidating a sector-wide support and providing Industry consensual recommendations for a joint European approach on Space Traffic Management in a context where it has been recognised as an issue of strategic importance by the European and national institutions.

In 2022, the TF published an official reaction to the European Commission and European External Action Service Joint Communication on STM. It also continued to have regular and formal exchanges with the European Commission/ EUSST Partnership as part of the newly created European Industry and Start-up Forum (EISF).

Secure satcom Flagship Task Force

The Secure Satcom Flagship Task Force was created by Decision of Eurospace Policy Committee on July 3rd 2020 and chaired by Ms Daniela Genta (Airbus Defence & Space).

The “EU Satcom Flagship” Task Force is established in view of consolidating a sector-wide support and providing Industry consensual recommendations to the ongoing reflections of the European institutions regarding the setting-up of a 3rd EU Flagship Programme for a global, strategic, resilient and secure space-based connectivity system, in line with the objective publicly laid out by European Commissioner Thierry Breton. More precisely, the Task Force will investigate and propose a rationale and a vision for a European space industry approach to a global, strategic, resilient and secure space-based connectivity system.

In 2022, the TF published an official reaction to the European Commission’s Proposal for a Regulation establishing the Union Secure Connectivity Programme. It also monitored all the legislative process that led to the adoption of the proposal by the European Parliament and the EU Member States (as well as insights into ESA optional programme).

ESA Industrial Policy Task force

The Eurospace “ESA Industrial Policy” Task Force was created by Decision of Eurospace Policy Committee on December 2019 and chaired by Mr Didier Morançais (Airbus Defence & Space).

The “ESA Industrial Policy” Task Force is established in view of providing Industry consensual recommendations to the ongoing reflections at ESA level on a new industrial policy (more specifically targeting the visibility of midcaps vs LSI and SMEs, the simplification of the ESA procurement process, the profitability of ESA contracts, IPRs, Supply chain aspects).

In September 2021, a Eurospace Position Paper on Profitability was published. In 2022, frequent and in-depth interactions between Eurospace TF and ESA executive took place throughout the year.

Inflation Task force

The Eurospace “Inflation” Task Force was created by Decision of Eurospace Policy Committee on May 3rd 2022 and chaired by Mr Didier Morançais (Airbus Defence & Space).

The “Inflation” Task Force is established in view of evaluating the impact of inflation on the financial health of the Industry and propose mitigation measures.

In 2022, the Eurospace Position Paper “Mitigate the costs of inflation to sustain the competitiveness of the European space supply chain” was published. Frequent and in-depth interactions between Eurospace TF and ESA executive took place throughout the year.

Copernicus Next Generation Task force

The Eurospace “Copernicus Next Generation” Task Force was created by Decision of Eurospace Policy Committee on November 23rd 2021 and chaired by Ms Shahrzad Larger (Thales Alenia Space).

The “Copernicus Next Generation” Task Force is established in view of consolidating a sector-wide support and providing Industry consensual recommendations and perspective, including about governance and new business models, for the future of the EU’s Earth Observation (EO) programme

In 2022, the Eurospace Position Paper “Copernicus: how to further enhance the impact of a world-class programme” was published.

Space Strategy for Security & Defence Task Force

The Eurospace “Space Strategy for Security & Defence” Task Force was created by Decision of Eurospace Policy Committee on May 3rd 2022 and chaired by Ms Céline Bégon (Thales Alenia Space).

The “EU Space Strategy for Security & Defence” Task Force is established in view of providing Industry consensual recommendations to the ongoing reflections of the European institutions regarding the future Joint EC-EEAS Communication about “an EU Space Strategy for Security and Defence” announced, i.e., in the Communication “Commission Contribution to European Defence”.

In 2022, the Eurospace Position Paper “Industry contribution to the ongoing reflections about an EU Space Strategy for Security and Defence” was presented to the European Commission and the European External Action Service.

Commercialisation, Innovative Procurement & Industrialisation

The Eurospace “Commercialisation, Innovative Procurement & Industrialisation” Task Force was created by Decision of Eurospace Policy Committee on November 11th 2022.

The “Commercialisation, Innovative Procurement & Industrialisation” Task Force is established in view of providing Industry consensual recommendations to frame European public institutions’ vision with regard to new industrial and commercial approaches to space system design, production and procurement, building on what is often referred to as the New Space.

Created late In 2022, the Task Force started working on a Position Paper.

TECHNOLOGY TASK FORCES

HEU FP9 Task Force

The Eurospace FP9 Task force is created by Decision of Eurospace Council on December 5th 2016.

The FP9 preparation Task Force is originally established in view of supporting the preparation of a consolidated position of Eurospace on FP9-Space. Considering the political context, including the uncertainties on the fate of the Partnership for space, and the requirement to organise Eurospace stakeholder's inputs to the former EC-Led Consultation Platform, the core task of the Task Force will be to support the expression of coordinated Eurospace inputs in the context of the Consultation Platform and/or European Co-programmed partnership. The secondary task of the Task Force will be to support the Eurospace executive dialogue towards the establishment of a joint association with other associations in view of the potential establishment of the co-programmed partnership for space competitiveness.

In 2022, the TF was regularly informed about the progresses of the Eurospace executive towards the creation of the space partnership.

STWG (Standardisation Working Group)

The Standardisation Working Group coordinates industry participation and representation in the ECSS (European Cooperation for Space Standardisation). As such, STWG is the standardisation body of Space industry. These activities enable the European space industry to develop a strategy for space standardisation,

and promote it through ASD-Eurospace, as a member and/or a stakeholder of European Space standardisation organisations, and at international level through relevant channels.

STWG is chaired by Olivier Leronde (Thales Alenia Space), it has 16 active members representing 7 different companies plus representation from other standardisation bodies and industry associations (as BNAE and SME4Space). Also, some of the industry representatives are also industry representatives at ISO WG. Apart from this, the STWG has a distribution mailing list to conduct all the ECSS associated process within industry (Public Reviews, WG nominations, ECSS reimbursement scheme).

During 2022, STWG transitioned to hybrid meetings. Physically held in the Eurospace premises, all STWG meetings are also accessible through teleconference to help accessibility and participation. During the year, 4 main hybrid meetings plus 2 teleconferences were held to prepare the ECSS Technical Authority and ECSS Steering Board meetings. Plus, punctual teleconferences to perform punctual actions and discussions were organised. Also, in 2022, the STWG held the first workshop on Industrialization, to prepare this new industry-proposed topic in the ECSS.

Among the main agenda points addressed in 2022:

- Nomination of replacement of Eurospace representatives at the Steering Board;
- Monitoring and comments on the ECSS simplification process, with the finalisation of the M-branch and initialisation of the Q-branch. This simplification of ECSS is a critical activity for industry and the evolution/future of ECSS;
- The active monitoring of ISO, including the detection and coordination of the STM US new proposals. With the ensuing coordination within the Eurospace STM Task Force, to coordinate industry posture to the STM standardisation discussion at ISO level;
- The proposed creation of an Industrialization branch at ECSS with the organisation of an Industrialization Workshop on November 2022 (60 participants from 18 different entities).
 - During the workshop, 5 main presentations with lessons learned, proposals and ideas were the starting point for a full day discussion on industrialization in ECSS. The outcomes of the workshop have been incorporated in the industry proposal to ECSS for the creation of a new I-branch.

During 2022, STWG conducted the following activities in the normal ECSS process:

- 6 calls for nominations and formation of WG to work in ECSS documents;
- 3 specific call for nominations for task forces and ECSS process such as Master Database, Glossary or Simplification;
- 12 public reviews of ECSS documents.

EEE Panel (Electronic, Electric and Electromechanical Components)

The EEE Panel coordinates industry participation and representation in the ESCC (European Space Components Cooperation). The Panel ensures that Industry participants are nominated to ESCC management bodies (SCSB: Space Components Steering Board, CTB, Components Technology Board) and prepare for consolidated industry positions to be expressed as required by ESCC.

The Panel changed from the former Chair Augustin Coello-Vera (ALTER Technology) to Jean-Louis Cazaux (Thales Alenia Space).

Routinely EEE-P activities include:

- ASD-Eurospace representation and coordination of position to be expressed at ESCC levels (CTB, SCSB, PSWG)
- General reporting of issues relevant to the EEE community, including CTB thematic sub-WGs.

This Working Group met 2 times in 2022. EEE Panel Meetings are organised by teleconference to ensure easiness of participation. Participation is adequate to the level of intensity of decisions taken, but remains limited to a few panel members (less than 10). Some members of the panel as industry members in the ESCC bodies were replaced during 2022. Email exchanges are frequent between WG members, and offline discussions allow the swift resolution of all issues as they arise.

In 2022, the EEE-P, with the coordination of Pierre Lionnet, prepared a position paper on EEE components supply chain in Europe (published in the first quarter of 2023).

ORDIN - Open Research development & Innovation Network

ORDIN is a proactive consultation process initiated in 2021 by Eurospace in order to improve the sector capacity to support the various technology strategy initiatives in Europe (ESA & EU) where industry contributions and/or feedback are expected. ORDIN is open to all stakeholders from the whole European space supply chain. The process is driven by both bottom-up and top-down exchanges on technology needs, drivers, challenges and capabilities.

The ORDIN objective is to streamline and enhance the capacity of the supply chain 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.

The process is open to ALL the European supply chain (RTOs, SMEs, newspace / emerging players, midcaps and large groups, primes and equipment suppliers, labs and research entities). Whether or not they are Eurospace members.

The process is supported by a **voluntary workshop-based approach** to collect information on stakeholders, state-of-the-art, technology trends, requirements, challenges and drivers. Workshops are open, free, and voluntary. They are only open to the Industry supply chain.

The outcome is a **supply chain-owned repository of technology requirements, capabilities, roadmaps and trends**. The repository supports the formulation of technology recommendations as required, on-time, and under stakeholders' control.

Eurospace objective is twofold:

- Improving the communication with ESA and the EU institutions when it comes to support technology development
- Improving the cohesion of the supply chain through increased industry exchanges and knowledge of the capabilities available in all Europe

The process eventually supports a globally enhanced end-to-end European space technology strategy both for ESA and the EU.

ORDIN ACTIVITIES IN 2022

In October and November 2022, Eurospace organised five ORDIN workshops, gathering a total of almost 200 participants covering a large array of the European space industry, to initiate the high-level recommendations collection for the following technology line:

- Electric propulsion technologies
- Photonics & optical communications
- Space computing & big data from space
- End of life strategies & technologies
- Materials, surfaces & smart manufacturing
- Critical Non-Dependence

The Eurospace ORDIN Workshops conclude the high-level recommendations collection of technology needs, drivers, challenges and capabilities prepared for ESA (Harmonisation) and European Commission (EPIC) consultations.

The ESA Technology Harmonisation subjects of 2022 addressed via ORDIN were:

- Cycle 1
 - Array Antennas and Periodic Structures
 - Lidar Critical Subsystems
 - Optical Detectors
 - PCB and Electronic Assemblies
- Cycle 2
 - Microwave Passive Hardware
 - Optical Communications from Space
 - Reflector Antennas

THP (Technology Harmonisation Panel)

The Technology Harmonisation Panel is a subset of the Research and Technology Committee of Eurospace. It was specifically established and maintained for the purpose of supporting the ESA coordinated Technology Harmonisation process. Its mandate is extended to support any Europe-wide consultation on space technology related topics.

The THP is composed of almost 1300 experts from almost 500 entities including Industry, Research and Technology Organisations, Universities and Academia. The THP membership reaches way beyond Eurospace membership. All the THP experts are registered at their request on the active Harmonisation Technology topics (~50 dossiers) and are only contacted when their topic(s) of interest is reviewed (~every 2-4 years). This expert's database is updated on a regular basis to reflect the modifications of ESA active topics and up to date contacts.

The mandate of the THP is to:

- enable consistent collection of expert inputs in support of European technology strategy, including the ESA technology harmonisation
- map the relevant expertise in the European space actors
- provide European experts with the most recent information available on specific technologies
- collect Experts inputs on the European capabilities/products available
- allow European experts to confront their views and converge on the recommendations to be done for the upcoming short to mid-term developments

REACH

In 2011, an Agency-Industry REACH WG was set up, with ESA coordination, to monitor and address REACH issues affecting the space sector. This WG monitors in particular the evolution of the REACH Candidate List and Annex XIV and its impact on the space sector.

Since 2012, the REACH WG activities were put under the mandate of the Materials and Technology WG of the CTB that later transformed into the MPTB (Materials and Processes Technology Board). Eurospace monitors activities of the MPTB to enable the identification of actions requiring joint industry actions; key Eurospace member companies also participate in the regular WG meetings.

In the frame of REACH activities, Eurospace liaises with the ASD REACH & Chemicals Management Working Group, ensuring appropriate information flow and coordination of actions between space and aeronautics sectors.

Together with our partners, Eurospace also follows closely the proposed evolutions of REACH and other relevant EU chemicals legislation, such as those considered under the European Commission's '**Chemicals Strategy for Sustainability**' of 14 October 2020.

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

- EMWG – Energetic Materials Working Group
- LTF – Lead Metal Task Force
- HTF – Hydrazine Task Force (inclusive of other liquid propellants)
- STF – Space Chromates Task Force
- WFD TF – Waste Framework Directive Task Force

The REACH Task Forces are led by Pierre Lionnet (Research Director).

All REACH activities of the space industry are coordinated with the Materials and Processes technology Board, managed by ESA. They are technically supported by REACHLaw.

All REACH Task Forces are opened to all stakeholders in the sector, whether or not they are members of Eurospace. In some cases, REACH Task Forces will require a financial contribution from participating entities, whether or not they are members of Eurospace.

In 2022, most REACH related activities were driven by:

- The legislative agenda for the REACH review and simplification update, for this the EC and the ECHA have extensively consulted industry stakeholders via the associations
 - In particular, delivering on simplification and burden reduction for industry as part of the revision of the REACH Regulation
- LTF contribution to ECHA public consultation after has included lead metal in its draft 11th recommendation for authorisation under the EU's REACH Regulation on chemical (working closely with ILA (International Lead Association) and the ASD
 - In particular, ECHA to withdraw its intention to propose lead metal for REACH authorisation – excessive amount of up to 200 or more applications estimated for lead-based soldering activities
- New EU ecodesign framework proposal
 - In particular, welcoming the product-specific approach of the proposal.
- 4th edition of ESA "Workshop on the EU REACH Regulation and its impact on the Space Sector"
- The SCIP database regulation, and the waste framework directive, addressing the end of life and recycling aspects of industrial products.

- In particular, the second update of the Best-Practice Guidance (BPG) for the European Space Sector to comply with SCIP notification.

More information (and in particular the list of substances of concern for the space sector) is provided in the List of attachments

The following documents are attached to the management report. They are restricted to General Assembly and Council members.

Financial Committee

- FinCom Report to the Council of June 2023

Position papers issued

- Eurospace Reaction Paper “Reaction of Eurospace about the Proposal for a Regulation establishing the Union Secure Connectivity Programme” – 25/03/2022
- Eurospace Reaction Paper “Reaction of Eurospace about the Joint Communication “An EU approach for STM”” – 05/04/2022
- Eurospace Position Paper “Mitigate the costs of inflation to sustain the competitiveness of the European space supply chain” - 05/09/2022
- Eurospace Position Paper “Copernicus: how to further enhance the impact of a world-class programme” – 23/09/2022
- Eurospace Position Paper “Industry Contribution to the future EU Space Strategy for Security and Defence” – 12/12/2022

Official letters sent

- Letter from Eurospace President André-Hubert Roussel to Director General DG DEFIS Timo Pesonen and to Director General Josef Aschbacher to accompany the release of the Eurospace survey on the impact assessment of the Ukraine crisis on the European space industry - 19/04/2022
- Letter from Eurospace President André-Hubert Roussel & Eurospace 5 VPs to ESA Member States Ministers in charge of Space Affairs to support the new package of programmes that ESA will present in November to its Member States and help Europe move forward in difficult political and economic times via substantial financial commitments – 02/09/2022
- Joint Letter from Eurospace, SME4SPACE, ESRE, EARTO, EASN in response to Ekaterini Kavadia (DG DEFIS) letter announcing the support of the European Commission with the set-up of a new CSA using the lump sum approach – 08/09/2022
- Letter from Eurospace President André-Hubert Roussel to MEP Christophe Grudler to congratulate him for the adoption of IRIS² in the European Parliament – 22/11/2022
- Letter from Eurospace President André-Hubert Roussel to HR/VP Josep Borrell, Commissioner Thierry Breton and Director General Timo Pesonen, to accompany the Eurospace Position Paper “Industry Contribution to the future EU Space Strategy for Security and Defence” – 12/12/2022

Information notes and Briefings produced

- Briefing – “The Connecting Europe Facility”
- Briefing – “NATO's overarching Space Policy”
- Conference Report – “14th European Space Conference 2022”

- Briefing – "Proposal for a Regulation 'establishing the Union Secure Connectivity Programme for the period 2023-2027'"
- Briefing – "An EU Approach for STM"
- Briefing – "Commission contribution to European Defence"
- Briefing – "Communication: Roadmap on critical technologies for security and defence"
- Briefing – "EU Global Action on Space"
- Eurospace Report – "Space Summit 2022"
- Eurospace Report – "Copernicus Horizon 2035 Conference"
- Information Note – "SRC/PSA Status"
- Briefing – "Sanctions against Russia - Impacts on space"
- Briefing – "The future EU Space Strategy for Security & Defence"
- Briefing – "Strategic Compass for Security & Defence - relevance for the space sector"
- Briefing – "Sneak-peak preview - Versailles Declaration"
- Briefing – "HEU/Space draft WP 23-24 general comments"
- Briefing – "Presidency Draft Compromise: Secure Connectivity"
- Eurospace Report – "Hybrid event on STM with MEP Marinescu"
- Briefing – "33 minutes with Catherine Kavadia"
- Briefing – "Presidency Draft Compromise: Secure Connectivity"
- Briefing – "Presidency Draft Compromise: Secure Connectivity - MS Comments"
- Briefing – "Second Presidency Draft Compromise: Secure Connectivity – MS Comments"
- Briefing – "EARSC's Earth Observation Café with Mauro Facchini"
- Eurospace Report – "Inaugural event of the European Industry and Start-ups Forum on STM (EISF)"
- Eurospace Report – "European Innovation Council Workshop: funding opportunities for space start-ups and SMEs"
- Briefing – "Joint Communication on the Defence Investment Gaps Analysis and Way Forward"
- Briefing – "Second annual Work Programme of the European Defence Fund (EDF)"
- Briefing – "Inflation and impact on Industry: setting the scene and initial discussions with ESA D/IPC"
- Briefing – "Evolution of Copernicus: key changes in ESA Long Term Scenario"
- Briefing – "ESA Programme Related to EU Secure Connectivity"
- Briefing – "Motion for a Resolution on Space Traffic Management"
- Information Note – "ESA EO Programme Proposal for CM22"
- Eurospace Report – "ITRE Committee, exchange of views on Ukraine"
- Briefing – "ITRE Committee's discussion on the draft Report on the Union Secure Connectivity Programme"
- Briefing – "June Competitiveness Council: interventions of Commissioner T. Breton"
- Briefing – "Version 3 of Draft Horizon Europe Workprogramme 23/24"
- Updated Briefing – "ESA Programme Related to EU Secure Connectivity"
- Eurospace Report – "European People's Party Group meeting: can Europe take the lead in space?"
- Eurospace Report – "Sky & Space Intergroup: towards a united EU voice on Space Traffic Management"
- Briefing – "Towards a Copernicus governmental service"
- Briefing – "Opinion of the Committee on Budget on the proposal for a regulation establishing the Union Secure"
- Briefing – "Regulation establishing the Union Secure Connectivity Programme: Council Conclusions compared to the Commission's proposal"
- Briefing – "Proposal for a Directive of the European Parliament and of the Council "on the resilience of critical entities"

- Briefing – “Transition Pathways”
- Eurospace Report – “European Parliament ambitions for the Connectivity satellites”
- Briefing – “EARSC Position Paper: Industry view of the future of Copernicus, a comparison”
- Briefing – “ESA Programme related to EU secure connectivity”
- Briefing – “Draft joint understanding on secure connectivity”
- Briefing – “Finalisation of MEP Ch. Grudler draft report on Secure connectivity”
- Briefing – “Space Traffic Management in European Parliament’s draft report on Secure connectivity”
- Eurospace Launch Control Room #1 “Summary of main launch events between 01/07/2022 & 30/09/2022”
- Eurospace Conference Report “EU Space Forum 2022 - "Embracing a new era for Space in Europe" (25-26/10/2022)"
- Briefing – "ESA Programme Related to EU Secure Connectivity - October Update"
- Briefing – "European Parliament's Resolution on STM"
- Briefing – "Update on standards related to Space Traffic Management"
- Briefing – "Impact of inflation on CM22 proposals"
- Briefing – "Proposed programmes for CM22 + budgets"
- Briefing – "European Parliament’s ITRE Compromise on Secure Connectivity"
- Briefing – "Council Recommendation: resilience of critical infrastructure"
- Briefing – "ESA CM22 - Analysis of contributions to optional programmes"
- Briefing – "Joint Communication on the EU Policy on Cyber Defense"
- Briefing – "Recommendations of the New Space Advisory Board (NAB) to ESA DG"
- Briefing – "First progress report on the implementation of the action plan on synergies between civil defence and space industries"
- Briefing – "Horizontal part of the 2023-2024 Work Programmes of the Union Space Programme"
- Briefing – "ESA November Council: Oral point on inflation"
- Briefing – "ESA CM22 - Analysis of contributions to optional programmes"

Relations with other associations

ASD

Eurospace is the space group of ASD. Eurospace monitors ASD activities to ensure the proper expression of Space specific aspects in all ASD related activities. This monitoring is particularly effective in the:

- Research and Technology Commission
- Chemicals WG
- External Affairs Committee
- Defence Business Unit (DBU)

In 2022, the majority of activities in relation with ASD were associated to the following ASD initiatives:

- Collaboration and coordination regarding the organisation of the Sky&Space Intergroup meetings when it concerns space topics;

- Creation of new ASD website;
- The ASD HEU Task Force where Eurospace executive gives regular updates on the developments of the Space Partnership;
- The liaison with Chemicals WG in the context of Eurospace REACH activities: all work in the REACH area performed at Eurospace is reported at ASD level to ensure full consistency of messages and procedures. Many REACH concerns are commonly shared by the three ASD sectors (such as Chromates, Lead, Waste treatment);
- Eurospace Secretary General is invited to all meetings of the “External Affairs Commission” and the “Defence Business Unit” where, if relevant, he expresses the position of Eurospace;
- ASD Defence Director has been invited and followed the activities of the TF “Space Strategy for Security & Defence” of Eurospace;
- Creation of new ASD website.

Other associations

Eurospace constitutes and maintains an active network of contacts in the main representative associations of the sector, at European and (occasionally) at national levels. Eurospace has thus regular contacts with following associations: SME4Space, ESRE, EARTO, EARSC, GSOA, GIFAS, BDLI, NEREUS, EASN, and AIAD.

More specifically, in 2022 Eurospace initiated the principle of friendly periodic information exchange meetings with interested national groups. Such monthly meetings were organised with BDLI. Other national groups are invited to join in the future.

Contracts and own revenue

DASIA conference

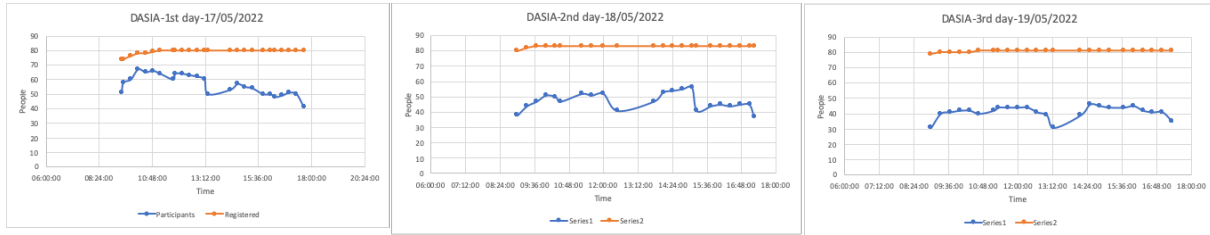
DASIA (DAta Systems in Aerospace) is an annual conference organised by Eurospace since 1996. It gathers every year about 100 space data systems specialists over 3 days for presentations, workshops/panels and discussions. It provides opportunities for exhibitors and networking. DASIA is a well-established event in the space community.

DASIA participants are representatives of the whole space system supply chain (including RTOs, labs, universities and the private industry: SMEs, midcaps and large groups, from components and equipment suppliers to sub-system and system integrators) and those of the institutional sector, mostly ESA and national agencies. They are mostly European, but wider international participation is welcome.

The conference addresses technical and managerial aspects of the development, operation and maintenance of data-handling related components and systems. It covers software, system engineering, and related hardware aspects for space systems (and other systems sharing similar requirements for high reliability and complexity).

DASIA 2022 key information:

- Event held online (Webex) 17-18-19/05/2022.
- 81 registered participants, 50 Papers organised across 3 sessions and 9 panels
- Good level of attendance overall (average per session): between 59 and 42.



DASIA Financials

The conference is organised on a commercial basis. Revenue is generated by collecting attendance fees (350€/attendee) and sponsor support (sponsor packages are available from 500 to 3000€). Regretfully the digital event does not provide the same opportunities for sponsors (no exhibition/stands lesser networking) and fails to generate the same sponsor revenue as the physical event.

DASIA 2022 "Digital" generated a gross margin of 30k€ offset by the use of Eurospace personnel resources (20k€) generating a net profit of 10k€.

In its physical configuration the conference usually yielded a gross margin of 35 to 45k€, and a 15 to 25k€ net profit on the event.

DASIA 2022 costs

Total Costs: 20360€

Eurospace human resources: 20k€

- Conference Management: Nathalie Alecson: 245 Hours
- Conference support: Angel Cuellar: 98 Hours
- DASIA Programme Committee and programme elaboration: Pierre Lionnet: 72 Hours

Other costs (Webex, bank charges etc.): 356€

DASIA 2022 revenues

Total revenues: 30850€

Of which:

- Participants fees: 28350€ (81 participants)
- Sponsors/exhibitors: 2500€ (2 sponsors: 1 Gold, 1 Basic)

EPIC and EPIC 2 (H2020 Grant)

In September 2014 Eurospace was invited to join the ESA-led consortium to bid for the H2020/space call COMPET-03-2014 (In-Space electrical propulsion and station keeping) to support the Electric Propulsion Strategic Research Cluster (SRC). Other partners in the consortium are ASI, CNES, DLR, CDTI, Belspo, UKSA and SME4Space. The object of the activity is to support European Commission in the definition and implementation of coordinated calls to develop EP systems for the future. The project name is EPIC, for Electric Propulsion Innovation and Competitiveness. The work is organized in 5 workpackages

- WP1 - Management (led by ESA)
- WP2 - Technology and requirements survey (led by CNES) – with Eurospace involvement.
- WP3 - Gap analysis (led by ASI)
- WP4 - Activity Roadmapping and project calls technical assistance (led by CDTI)
- WP5 - Dissemination (Led by CDTI)

In 2019 the Commission decided to further the EPIC project, for 5 more years with the recommendation to widen the scope of industry participation in it, and in particular to allow industry inputs to the roadmapping process.

Under the name EPIC2, the project elaborated in 2020 a complete action plan for Electric Propulsion under Horizon Europe. Industry contribution through Eurospace was instrumental in its elaboration.

During 2022, Eurospace continued its support to the EPIC consortium with the organisation of a dedicated ORDIN workshop on Electric Propulsion to gather Industry inputs on Technology and to prepare the update of the consortium Roadmap.

The work performed in 2022 on EPIC2 yielded close to 20k€ in 2022 (pending approval by COM).

EU Action 10

Eurospace joined the consortium led by Spaceteq partners for the Action 10 procurement launched by EU DG DEFIS.

Through this procurement, the European Commission is seeking to contract an expert advisory team which provides a one-stop-shop support capable of delivering in 2021-2024 detailed analyses, studies, stakeholder consultation and communication activities related to the programming and monitoring cycle of EU funded R&I in the space sector.

Eurospace joined a consortium led by Spaceteq Partners to bid for the tender. The consortium was eventually selected.

Eurospace has sought involvement in the activity with two main objectives:

- A political objective: ensure the involvement of Eurospace in a project that will manage the EU consultation Platform for Horizon Europe Space competitiveness – this involvement shall guarantee full visibility of related activities in the Platform
- A financial objective: seek alternative revenue sources in 2021 and beyond to compensate the termination of the ESA Harmonisation contract.

Eurospace was allocated a workshare of 284k€ for 4 years, with involvement in the following work packages

- Eurospace Lead
 - WP2.1 Analysis of the required industrial skills
 - WP5.2 Website development
 - WP5.5 Repository with the ensemble of the communication material
- Eurospace support
 - WP2.1.2 Recommendations on improving space community's leverage of and linkage to existing opportunities
 - WP3.1 Monitoring methodology for EU-funded projects
 - WP3.2 Monitoring of EU-funded projects - state of the art

- WP3.3 EU-funded projects in the field of space and the path to innovation
- WP5.1 Communication strategy development

Activities on the project started at end August 2021. The project will run over 4 years. The total Eurospace workshare is worth 286k€ in total. The annual revenue shares will be split according the usage of resources and project progression hypothesis available below.

Work package	Type of contribution	Unit price (€)	Work days	Price (€)
WP1	Project Manager/ Sen. Researcher	1 368	9	12 312
WP1	Sen. consultant/ Engineer	728	2	1 456
WP1	Analyst	568	30	17 040
WP2	Project Manager/ Sen. Researcher	1 368	13	17 100
WP3	Project Manager/ Sen. Researcher	1 368	54	73 872
WP3	Analyst	568	135	76 680
WP5	Project Manager/ Sen. Researcher	1 368	24	32 832
WP5	Sen. consultant/ Engineer	728	5	3 640
WP5	Analyst	568	72	40 896
WP5	Website hosting technical management	10 000	na	10 000
Total			344	285 828

Eurospace will bring its resources and expertise on 4 Work Packages, WP1, WP2, WP3 and WP5 according to the following split:

- WP1: 30 808€
- WP2: 17 100€
- WP3: 150 552€
- WP5: 87 368€

Eurospace revenues have been agreed with the coordinator to follow the schedule available below:

In WP resources %:

Action 10 STARS*EU nominal progression	2021 (2 months)	2022 (full year)	2023 (full year)	2024 (full year)	2025 (10 months)	Total
WP1	1,2%	50,0%	48,8%			100%
WP2	2,0%	50,0%	48,0%			100%
WP3	1,5%	25,0%	25,0%	25,0%	23,5%	100%
WP5	22,5%	16,7%	16,7%	16,7%	27,5%	100%

In values:

Action 10 STARS*EU nominal progression	Income charged in 2021	Income charged in 2022	Income charged in 2023	Income charged in 2024	Income charged in 2025	Eurospace income per WP
WP1	€ 369	€ 15 404	€ 15 035	€ -	€ -	€ 30 808
WP2	€ 342	€ 8 550	€ 8 208	€ -	€ -	€ 17 100
WP3	€ 2 216	€ 37 638	€ 37 638	€ 37 638	€ 35 422	€ 150 552
WP5	€ 19 566	€ 14 561	€ 14 561	€ 14 561	€ 24 118	€ 87 368
Total	€ 22 493	€ 76 153	€ 75 442	€ 52 199	€ 59 540	€ 285 828

This schedule takes into account the specificities of the start year (2021), with a limited amount of work on WP1 and WP2 and on the contrary, more efforts on the WP5 with the need to deliver the Website technical activities urgently. For the following years, it takes into account the nominal duration of the WP in full years. It also includes a specific phase at the end of the project for WP5, requiring an additional Eurospace activity for the Website to prepare an online library which would be accessible to all the European supply chain actors.

In 2022, mostly in relation to the work on WP5, Eurospace could recognise 76153€ of revenues on this contract.

ECSS support (ESA Contract)

ESA entrusts Eurospace to manage the reimbursement of travel costs to industry contributors to the standards drafting activities. This contract is of an administrative nature and covers the fixed costs of Eurospace management, a pro rata on each reimbursed amount covers the variable costs associated to the management costs of the reimbursements. Due to travel limitations imposed by the Covid crisis

In addition, Eurospace manages, coordinates and controls the industrial activities in ECSS and is responsible for:

1. distribution of information and documents (in particular draft standards) to industry
2. consolidation and transmission of industry comments, data, feedback from ECSS documents application, mail, organisation of the Contractor, ECSS Panel meetings.

This activity is supported by ESA with a cost reimbursement contract.

The contract yielded 33k€ in 2022.

GIFAS Facts & Figures

In 2021 GIFAS furthered the contractual support to the annual contribution of Eurospace facts & figures to the French industry association statistics.

The contract yielded 18k€ in 2021.

Data licensing

No licensing of copyrighted data in 2022.

ESA-Industry Seminar on the "Future of ESA Earth Observation Programmes"

On 12-13 April 2022, ESA convened a high-level ESA-industry dialogue virtual event to review the key aspects of the future ESA programme proposals in Earth observation, in view of the Ministerial Council Meeting of November. Eurospace, with the help of EARSC, organised this seminar with an average participation of 100 persons/day on behalf and with the active participation of ESA.

Following the event, Eurospace gave European EO supply chain stakeholders a possibility to share their views with ESA on the outcome and conclusions of the Seminar and more generally speaking on the ESA EO programme proposal for the Ministerial Council of 2022, via the setting-up of a survey

This online survey was open to European supply chain stakeholders in Space Earth Observation (in the upstream and downstream communities) and could be completed from the point of view of individual experts and/or providing a consolidated viewpoint of the companies.

The service provision included:

1. A dedicated survey with industry stakeholders, large and small, and including RTOs³.
2. The preparation of an ESA/Industry virtual workshop/seminar of 2 days addressing the key topics supporting the sharpening of the ESA EO strategy
3. The elaboration of conclusions drawing from the outcome of the survey and the workshop/seminar discussions.

The service was provided by Eurospace.

- The service was provided at a total firm fixed price of 47423€

The net profit for Eurospace on the activity (after deduction of Eurospace resources consumed by the action) was slightly negative due to inefficiencies (too many meetings, and excessive meeting duration requested by the customer, lengthy decision process from customer side, and frequent changes of customer requirements).

The ESA EO strategy workshop, despite its high toll on resources, has exhibited strong positive synergies with Eurospace industry coordination and advocacy mandates. For instance, in the wake of the Workshop, and taking advantage of the large and diverse amount of supply chain viewpoints gathered during the workshop, and extensive Eurospace position paper on ESA EO strategy for CMIN22 was produced and presented to ESA.

³ Research and Technology Organisations

Internal affairs

Eurospace President and Council

In 2022, Eurospace President was André Hubert Roussel (ArianeGroup CEO) on a 3-year mandate that started in June 2020.

The complete composition of the Eurospace Council in 2022 is provided in annex.

Membership update

For membership status, refer to: Annex - Eurospace Council And Membership - December 2022

New members

In 2022, Eurospace has welcome 35 new members to offer to the institutional actors an interlocutor even more representative of the European space supply chain. This major increase in new memberships is a direct consequence of the membership update (see below) and the open policy promoted by Eurospace to remain attractive to medium-sized and small companies with a European footprint, and to increase the Association's geographical coverage, in line with the characteristics of today's European space sector.

New members that joined Eurospace in 2022 are:

- Belgium:
 - GMV Innovating Solutions S.R.L.
 - AntwerpSpace N.V
 - Telespazio Belgium SRL
 - RHEA Group
 - ST Engineering iDirect Europe CY NV
- France:
 - Air Liquide France Industry
 - ALTER Technology-TÜV Nord France
 - CGI France SAS
 - Loft Orbital
 - GMV Innovating Solutions SARL
 - SpaceAble
- Germany:
 - CS GmbH
 - GMV GmbH
- Italy:
 - Elecnor Infrastrutture e Aerospaziale
 - eGEOS
 - ALTEC
- Luxemburg:
 - Thales Alenia Space Luxembourg
- Netherlands:
 - MOLTEK;
 - GMV Innovating Solutions B.V

- Poland:
 - GMV Innovating Solutions Sp.z o.o.
 - Thales Alenia Space Poland
- Portugal:
 - Deimos Engenharia
 - GMVIS Skysoft S.A.
 - Neuraspace
- Romania:
 - CS Romania;
 - Deimos Space Romania
 - GMV Innovating Solutions S.R.L.
- Spain:
 - GMV Aerospace & Defense S.A.U.
 - GMV Soluciones Globales Internet S.A.U.
 - Pangea Aerospace
- Switzerland:
 - Thales Alenia Space Switzerland
- United Kingdom:
 - ALTER Technology-TÜV Nord UK
 - Deimos Space UK
 - GMV NSL Limited
 - Thales Alenia Space UK

Members restructuring

No restructuring in 2022 membership.

Members resigning

No members resigning in 2022.

Membership options

Following the Council decision of June 2020, the Eurospace executive was tasked to reflect on the modernisation of the membership scheme of Eurospace, with a view to making Eurospace membership fee scheme fairer and more attractive to a wider array of stakeholders.

The guiding principles for the membership evolution were:

- A more balanced cost of membership for smaller entities and entities with a European footprint
- Allow current members to include their subsidiaries without additional high entry costs
- Attract new members with a more attractive membership scheme for smaller entities
- Maintain the 'legacy' membership fee scheme for all members who want to keep it.

The executive presented the outcome of its reflections to the Council and General Assembly of December 2020, and **3 new membership schemes were approved**, targeting the membership of companies as corporate groups with medium and large group membership, and a special membership scheme for SMEs.

The new membership formula, launched in 2021, were available to Eurospace members in 2022.

"Legacy" membership	"Mid-size/midcap group" membership	"Large group" membership	"SME membership"
<ul style="list-style-type: none"> • Current • Accessible to members that wish to retain this scheme • Formula: <ul style="list-style-type: none"> • 8636€ entry fee (inclusive of 100 space employees) • 20,32€ for each employee above 100 	<ul style="list-style-type: none"> • New • Accessible to all members with a European footprint, and less than 3000 space employees • Formula <ul style="list-style-type: none"> • 10000€ entry fee (inclusive of 250 employees) • 22€ for each employee above 250 	<ul style="list-style-type: none"> • New • Accessible to all members with a European footprint, and 3000 space employees or more • Formula <ul style="list-style-type: none"> • 30000€ entry fee (inclusive of 750 employees) • 22€ for each employee above 750 	<ul style="list-style-type: none"> • New • Accessible to SMEs • Formula <ul style="list-style-type: none"> • 1500€ entry fee (inclusive of 30 employees) • 22€ for each employee above 30

The current status of membership is as follows

Type of membership	Association	Large group	Midcap	SME	Total
Group		37	24		61
Legacy	2	9	9		20
SME				3	3
Total	2	46	33	3	84

Personnel in 2022

In 2022, the Eurospace team was composed of 8 members, all full-time employees.

Permanent team members

- Lemaitre Olivier - Secretary General
- Lionnet Pierre - Research and Managing Director
- Treuet Jean-Charles – Head of Technology Strategy
- Galland Charles – Policy Manager
- Cuellar Angel - Standardisation and database Manager
- Alepton Nathalie - Office and Conference Manager

Temporary team members

- Delpierre Jeanne – EU Junior Policy Analyst (French Volontariat International à l’Etranger scheme) – left on September 30th 2022 following her recruitment by French Ministry for International Affairs
- Lefèvre Emma - EU Junior Policy Analyst (French Volontariat International à l’Etranger scheme) – arrived at Eurospace on December 1st 2022

Transparency disclosures

- In 2022, Olivier Lemaitre was registered as an individual expert for the European Commission in the frame of their Space Industry Expert sub-Group.
- In 2022, Olivier Lemaitre joined the Advisory Board of Deloitte/KU Leuven in the frame of the DG DEFIS request for services regarding Space Traffic Management standardisation.

- In 2022, Pierre Lionnet was registered as an individual expert for the European Commission to advise on matters of space economics in the context of the European Innovation Council activity.
- In 2022, Pierre Lionnet joined Starburst Ventures (starburst.vc), a seed/start investment fund as 'hands on advisor' on all aspects of the space economy. Time commitments are minimal. The contract is available on request.

Other internal matters

Human resources budget evolution

Decision

At the June 2022 Council, Eurospace president highlighted the excellent team performance, and invited the Board and General Assembly to acknowledge it. He also invited the management to design and propose a retainer plan for the team. The retainer plan will build upon the current compensation scheme across the whole Eurospace salary scale.

The management has designed an HR plan for 2023-2027 inclusive of the following aspects:

- Replenishment of the permanent team with a full-time hire to be operational in 2023
- Roll out of a retainer plan inclusive of inflation compensation targeting the lower end of the salary scale, and individualised premiums/incentives based on achievements and performance. This retainer plan is proposed in line with the course of action set by the President, Council and General assembly in June 2022.

In line with the course of action delineated by the President, the management also makes a proposal for the financing of the plan, aiming at enlarging the membership revenues, with a flexible scenario for implementation. The overarching objective being to align the revenues of membership fees with workforce costs, without changing the fees formula.

The Council concluded that the team continues to perform well and expressed its support for a **budget increase capped to 120K€** and that the mechanism of the “exceptional fees” is clever and welcome, also as an incentive for all members to recruit new industries (recalling, that the 6 new members acquired in 2022 will increase by more than 30k€ the income from fees in 2023).

More details are provided in Annex - Human Resources budget evolution

Implementation

The General assembly would:

- vote a resolution to recognise the need to grow the workforce budget envelope within the limits presented in the workforce budget projections;
- vote a resolution to acknowledge the need to increase the revenues from membership fees to support workforce costs evolution;
- vote a resolution to allow the executive to levy an exceptional fee to cover the funding gap between workforce costs and standard fees revenue:
 - the exceptional fee will be measured as the difference between agreed workforce budget for the next year and projected fees revenue on the same year (based on reply slips);

- the exceptional fee would be distributed proportionally on members (baselined on the standard fee);
- Note: this fee is “exceptional” also in the sense that it will progressively be reduced in proportion to the increase of the membership perimeter.

Summary financial report

The FinCom notes a good control of the financial situation by the executive. The 2022 financial execution was executed above planning:

- Net profit: 21,4k€

This positive outturn is mostly due to good management of overheads, to compensate the negative impact on revenues of lower than expected own revenue and the outturn of membership fees.

The 2023 financial prospects are highly improved on the revenues side, with growth on both own revenues (+56k€) and membership fees (+82k€). It is worth noting that the growth in Membership revenues is driven by an improved outturn on legacy members (about 50% of the growth) and the increase fees provided by the new members acquired in 2022. Both positive impacts have been driven by management actions.

Despite the improvement of revenues, the situation of Eurospace at end 2023 is expected to exhibit a moderate loss, mostly due to the increase in workforce costs, due to the retainer and incentive plan agreed at the June 2022 Council meeting, and with the recruitment of a new staff member to recover the workforce level required to pursue the activities of the association. Subsequent years could also exhibit a structurally negative balance.

Notwithstanding, the financial projections to 2027 are not critical thanks to the good level of reserves and liquidities.

Furthermore, FinCom notes that contract revenues are difficult to plan in advance which means that with management efforts additional contract revenues can offset the loss prospects in coming years.

There is, in particular, the potential of revenue associated to Co-Programme partnership (CPEP) via an ad hoc Contract Support Activity grant. Even with the most prudent assumptions, this additional revenue alone should suffice to balance the accounts.

As a result, and even in a worst-case financial scenario without additional external revenue, FinCom concludes that:

- The equity situation in control until 2027
- Treasury and cash situation are in control until 2027 with the current level of liquidities > 500k€

2022 Accounts closure

The closure of accounts⁴ for 2022 is well aligned with projections, and budget execution according to Council expectations was consistent, despite a few deviations.

- The most significant deviation is for the revenues from Membership fees, that registered below the projected amount by 20k€.

⁴ Accounts are closed and certified by the Eurospace chartered accountant (Fatima Boumerzag, working for Cabinet In Extenso - <https://www.inextenso.fr/agence/expert-comptable-paris-boulogne-billancourt/>). They will be, as usual, audited by an independent auditor (Commissaire aux Comptes) in view of their endorsement by the General Assembly of June.

- Revenue from grants and contracts (own revenues) was also lower than expected, mainly due to the lower revenue on ECSS (lesser travel due to COVID has an impact on Eurospace revenues), and EPIC related work that stalled.
- Cost control measures were still in effect, resulting in lower than budgeted expenses, mostly on overheads.

This allowed to close the year with balanced accounts and a profit of 21,4 k€.

The chart below provides the review of budgeted vs realisation in 2022 (in Euro).

	2022 (real)	2022 (budgeted)
Annual Gross Result	€ 26 675	-€ 4 556
Profit tax	€ 5 254	
Organic profit/loss	€ 21 421	-€ 4 556
Year	2022 (real)	2022 (budgeted)
Revenue	€ 1 071 690	€ 1 112 074
Products	2022 (real)	2022 (budgeted)
Membership fees	€ 838 509	€ 859 529
Financial Products	€ 801	€ 300
Contracts	€ 174 622	€ 163 400
Grants	€ 19 994	€ 52 995
Conferences	€ 32 660	€ 30 850
Miscellaneous	€ -	€ -
Subvention	€ 5 000	€ 5 000
Recharge	€ 105	€ -
Own revenue	€ 233 182	€ 252 545
Expenditure	€ 1 045 015	€ 116 630
Charges	2022 (real)	2022 (budgetd)
Salaries	€ 812 656	€ 829 518
Amortizing	€ 4 564	€ 6 200
Usual expenditures	€ 129 436	€ 13 636
Add. Expenditures	€ -	€ -
Usual External providers	€ 71 704	€ 108 498
Add. External providers	€ -	€ 600
Usual missions expenses	€ 14 287	€ 22 603
Add. missions expenses	€ -	€ -
Taxes	€ 12 368	€ 17 075
Miscellaneous	€ -	€ 1 500
Exceptional management costs	€ -	€ -

Simplified financial statements 2018 to 2022

Title/Year	TT	2018 (r)	2019 (r)	2020 (r)	2021 (r)	2022 (r)
Revenue		2 016 861	2 136 106	1 326 752	1 082 353	1 071 690
▫ Membership fees		852 238	868 440	874 950	872 757	838 509
▫ Contracts		314 179	369 509	341 865	146 811	174 622
contract: Action 10			-		22 493	76 153
contract: ECSS		34 722	35 591	35 530	31 203	33 045
contract: Explo 2030+ (2021) EO Strategy (2022)					46 865	47 423
contract: FF & Data					28 250	
contract: GIFAS		-	18 000	18 000	18 000	18 000
contract: Harmonisation		279 457	315 918	252 335		
contract: REACH HTF				36 000		
▫ Grants		665 073	750 745	109 642	21 775	19 994
contract: EPIC (1 & 2)		6 249	-	24 691	21 775	19 994
contract: PPOSS		31 468	7 358	-		-
contract: STEPP		627 355	743 387	84 951		-
▫ Conferences		113 230	112 890		39 850	32 660
contract: DASIA		113 230	112 890		39 850	32 660
▫ Financial Products		3 460	1 211	115	1 157	801
▫ Miscellaneous		5 970	4 993	-		-
▫ Recharge		42 121	28 319	180	3	105
▫ Salaries				-		
▫ Subvention		20 590	-	-		5 000
Expenditure		1 850 344	2 219 918	1 286 514	1 012 605	1 050 969
▫ Add. Expenditures		39 977	40 154	38 032		-
▫ Add. External providers		67 233	301 540	59 123	10 000	-
▫ Add. missions expenses		11 681	14 453	817		-
▫ Amortizing		11 466	13 307	10 025	5 487	4 564
▫ Exceptional management costs		36 088	374 872	2 706		-
▫ Miscellaneous		2 719	1 404			
▫ Salaries		1 151 019	1 048 082	849 088	784 216	812 656
▫ Taxes		22 574	13 494	17 075	12 600	12 368
▫ Usual expenditures		174 654	166 507	131 666	117 560	130 136
▫ Usual External providers		226 727	212 031	170 496	81 973	71 704
contract: DASIA		79 419	67 356	54 824	6 890	677
contract: Explo 2030+ (2021) EO Strategy (2022)				15 473	15 473	
Recurrent		147 309	144 676	100 199	59 610	71 026
▫ Usual missions expenses		51 449	34 074	7 487	4 191	14 287
▫ Profit Tax		54 756	-	-	16 578	5 254

(r) real - (e) estimate

List of attachments

The following documents are attached to the management report. They are restricted to General Assembly and Council members.

Financial Committee

- FinCom Report to the Council of June 2023

Position papers issued

- Eurospace Reaction Paper “Reaction of Eurospace about the Proposal for a Regulation establishing the Union Secure Connectivity Programme” – 25/03/2022
- Eurospace Reaction Paper “Reaction of Eurospace about the Joint Communication “An EU approach for STM”” – 05/04/2022
- Eurospace Position Paper “Mitigate the costs of inflation to sustain the competitiveness of the European space supply chain” - 05/09/2022
- Eurospace Position Paper “Copernicus: how to further enhance the impact of a world-class programme” – 23/09/2022
- Eurospace Position Paper “Industry Contribution to the future EU Space Strategy for Security and Defence” – 12/12/2022

Official letters sent

- Letter from Eurospace President André-Hubert Roussel to Director General DG DEFIS Timo Pesonen and to Director General Josef Aschbacher to accompany the release of the Eurospace survey on the impact assessment of the Ukraine crisis on the European space industry - 19/04/2022
- Letter from Eurospace President André-Hubert Roussel & Eurospace 5 VPs to ESA Member States Ministers in charge of Space Affairs to support the new package of programmes that ESA will present in November to its Member States and help Europe move forward in difficult political and economic times via substantial financial commitments – 02/09/2022
- Joint Letter from Eurospace, SME4SPACE, ESRE, EARTO, EASN in response to Ekaterini Kavvada (DG DEFIS) letter announcing the support of the European Commission with the set-up of a new CSA using the lump sum approach – 08/09/2022
- Letter from Eurospace President André-Hubert Roussel to MEP Christophe Grudler to congratulate him for the adoption of IRIS² in the European Parliament – 22/11/2022
- Letter from Eurospace President André-Hubert Roussel to HR/VP Josep Borrell, Commissioner Thierry Breton and Director General Timo Pesonen, to accompany the Eurospace Position Paper “Industry Contribution to the future EU Space Strategy for Security and Defence” – 12/12/2022

Information notes and Briefings produced

- Briefing – “The Connecting Europe Facility”
- Briefing – “NATO's overarching Space Policy”
- Conference Report – “14th European Space Conference 2022”
- Briefing – “Proposal for a Regulation 'establishing the Union Secure Connectivity Programme for the period 2023-2027”
- Briefing – “An EU Approach for STM”

- Briefing – "Commission contribution to European Defence"
- Briefing – "Communication: Roadmap on critical technologies for security and defence"
- Briefing – "EU Global Action on Space"
- Eurospace Report – "Space Summit 2022"
- Eurospace Report – "Copernicus Horizon 2035 Conference"
- Information Note – "SRC/PSA Status"
- Briefing – "Sanctions against Russia - Impacts on space"
- Briefing – "The future EU Space Strategy for Security & Defence"
- Briefing – "Strategic Compass for Security & Defence - relevance for the space sector"
- Briefing – "Sneak-peak preview - Versailles Declaration"
- Briefing – "HEU/Space draft WP 23-24 general comments"
- Briefing – "Presidency Draft Compromise: Secure Connectivity"
- Eurospace Report – "Hybrid event on STM with MEP Marinescu"
- Briefing – "33 minutes with Catherine Kavadia"
- Briefing – "Presidency Draft Compromise: Secure Connectivity"
- Briefing – "Presidency Draft Compromise: Secure Connectivity - MS Comments"
- Briefing – "Second Presidency Draft Compromise: Secure Connectivity – MS Comments"
- Briefing – "EARSC's Earth Observation Café with Mauro Facchini"
- Eurospace Report – "Inaugural event of the European Industry and Start-ups Forum on STM (EISF)"
- Eurospace Report – "European Innovation Council Workshop: funding opportunities for space start-ups and SMEs"
- Briefing – "Joint Communication on the Defence Investment Gaps Analysis and Way Forward"
- Briefing – "Second annual Work Programme of the European Defence Fund (EDF)"
- Briefing – "Inflation and impact on Industry: setting the scene and initial discussions with ESA D/IPC"
- Briefing – "Evolution of Copernicus: key changes in ESA Long Term Scenario"
- Briefing – "ESA Programme Related to EU Secure Connectivity"
- Briefing – "Motion for a Resolution on Space Traffic Management"
- Information Note – "ESA EO Programme Proposal for CM22"
- Eurospace Report – "ITRE Committee, exchange of views on Ukraine"
- Briefing – "ITRE Committee's discussion on the draft Report on the Union Secure Connectivity Programme"
- Briefing – "June Competitiveness Council: interventions of Commissioner T. Breton"
- Briefing – "Version 3 of Draft Horizon Europe Workprogramme 23/24"
- Updated Briefing – "ESA Programme Related to EU Secure Connectivity"
- Eurospace Report – "European People's Party Group meeting: can Europe take the lead in space?"
- Eurospace Report – "Sky & Space Intergroup: towards a united EU voice on Space Traffic Management"
- Briefing – "Towards a Copernicus governmental service"
- Briefing – "Opinion of the Committee on Budget on the proposal for a regulation establishing the Union Secure"
- Briefing – "Regulation establishing the Union Secure Connectivity Programme: Council Conclusions compared to the Commission's proposal"
- Briefing – "Proposal for a Directive of the European Parliament and of the Council "on the resilience of critical entities"
- Briefing – "Transition Pathways"
- Eurospace Report – "European Parliament ambitions for the Connectivity satellites"
- Briefing – "EARSC Position Paper: Industry view of the future of Copernicus, a comparison"

- Briefing – “ESA Programme related to EU secure connectivity”
- Briefing – “Draft joint understanding on secure connectivity”
- Briefing – “Finalisation of MEP Ch. Grudler draft report on Secure connectivity”
- Briefing – “Space Traffic Management in European Parliament’s draft report on Secure connectivity”
- Eurospace Launch Control Room #1 “Summary of main launch events between 01/07/2022 & 30/09/2022”
- Eurospace Conference Report “EU Space Forum 2022 - "Embracing a new era for Space in Europe" (25-26/10/2022)”
- Briefing – “ESA Programme Related to EU Secure Connectivity - October Update”
- Briefing – “European Parliament's Resolution on STM”
- Briefing – “Update on standards related to Space Traffic Management”
- Briefing – “Impact of inflation on CM22 proposals”
- Briefing – “Proposed programmes for CM22 + budgets”
- Briefing – “European Parliament’s ITRE Compromise on Secure Connectivity”
- Briefing – “Council Recommendation: resilience of critical infrastructure”
- Briefing – “ESA CM22 - Analysis of contributions to optional programmes”
- Briefing – “Joint Communication on the EU Policy on Cyber Defense”
- Briefing – “Recommendations of the New Space Advisory Board (NAB) to ESA DG”
- Briefing – “First progress report on the implementation of the action plan on synergies between civil defence and space industries”
- Briefing – “Horizontal part of the 2023-2024 Work Programmes of the Union Space Programme”
- Briefing – “ESA November Council: Oral point on inflation”
- Briefing – “ESA CM22 - Analysis of contributions to optional programmes”

Annex - Eurospace Council And Membership - December 2022

Eurospace Council status

As of December 2022

Company	Country	Last Name	First Name
Airbus Defence & Space Gmbh	Germany	PLASS	Joerg
Airbus Defence & Space Ltd	United Kingdom	MACKEN	Sarah
Airbus Defence & Space Netherlands B.V.	Netherlands	POSTMA	Rob
Airbus Defence & Space Sas	France	NASR	Jean-Marc
Airbus Defence & Space Sau	Spain	DEL MAR FERNANDEZ	Maria
Arianegroup Gmbh	Germany	GODART	Pierre
Arianegroup Sas	France	ROUSSEL	André-Hubert
Arianespace	France	ISRAEL	Stéphane
ASD Europe	Belgium	PIE	Jan
Avio Spa	Italy	RANZO	Giulio
Beyond Gravity Austria	Austria	SUST	Manfred
Beyond Gravity Swiss	Switzerland	LINDER	Anders
CGI Deutschland B.V. & Co. KG	Germany	LEIBNITZ	Ulli
Deimos Space	Spain	LOPEZ	Ismael
GMV Aerospace & Defense S.A.U.	Spain	FRAGA	Enrique
GMV Innovating Solutions S.R.L. (RO)	Romania	MOLINA-COBOS	Miguel Angel
Kongsberg Defence & Aerospace	Norway	HEGRESTAD	Trond
OHB Systems AG	Germany	FUCHS	Marco
SABCA	Belgium	DUBOIS	Marc
Safran Aircraft Engines	France	BETERMIER	Jean-Marie
Telespazio Italy Spa	Italy	PASQUALI	Luigi
Terma A/S	Denmark	JÖRGENSEN	Carsten
Thales Alenia Space Belgium	Belgium	MALLER	Inna
Thales Alenia Space France	France	DERREY	Hervé
Thales Alenia Space Italy	Italy	COMPARINI	Massimo
Thales Alenia Space Spain	Spain	TERRANOVA	Stephane
Thales Alenia Space UK	United Kingdom	STANNILAND	Andrew

Eurospace Policy Committee status

As of December 2022

Company	Country	Last Name	First Name
AED	PORTUGAL	SANTOS	Rui
ADS UK	UNITED KINGDOM	MARIONNEAU	Julie
AIR LIQUIDE ADVANCED TECHNOLOGIES	FRANCE	ROMA	Delphine
AIRBUS DEFENCE & SPACE GERMANY GmbH	GERMANY	MAYER	Thomas
AIRBUS DEFENCE & SPACE Ltd	UNITED KINGDOM	MACKEN	Sarah
AIRBUS DEFENCE & SPACE SAS	FRANCE	MORANCAIS	Didier
AIRBUS DEFENCE & SPACE SAS	FRANCE	GENTA	Daniela
AIRBUS	FRANCE	DE CORDOUE	Bertrand
ALTER TECHNOLOGY-TÜV NORD S.A.U.	SPAIN	NUNEZ TERUEL	David
APCO TECHNOLOGIES	SWITZERLAND	MANZONI	Didier
ARIANE GROUP SAS	GERMANY	MAGER	Alexander
ARIANE GROUP SAS	FRANCE	D'HEILLY	Agnes
ARIANESPACE	FRANCE	OESTERSCHLINK	Manuel
AVIO SpA	ITALY	FONTANA	Angelo
AZUR SPACE	GERMANY	KHORENKO	Victor
BEYOND GRAVITY AUSTRIA	AUSTRIA	GRABMAYR	Georg
BEYOND GRAVITY SWISS	SWITZERLAND	BORSAND	Markus
CGI DEUTSCHLAND B.V. & Co. KG	GERMANY	LEIBNITZ	Ulli
CGI DEUTSCHLAND B.V. & Co. KG	GERMANY	HINÜBER	Arndt
CGI FRANCE SAS	FRANCE	LADUREE	Sylvain
CGI FRANCE SAS	FRANCE	PARMITANO	Luca
DASSAULT AVIATION	FRANCE	VALES	Marc
DEIMOS	SPAIN	TOURNE	Ignacio
DEIMOS	SPAIN	GONZALEZ	Jose Antonio
GMV Aerospace and Defence S.A.U.	SPAIN	MOLINA	Miguel
INDRA SISTEMAS SA	SPAIN	GONZALEZ	Pablo
INDRA SISTEMAS SA	SPAIN	LUENGO	David
KONGSBERG DEFENCE & AEROSPACE	NORWAY	HEGRESTAD	Trond
KONGSBERG DEFENCE & AEROSPACE	NORWAY	SAELEBAKKE	Stig
LOFT ORBITAL	FRANCE	CARCAILLON	Elisa
LOFT ORBITAL	FRANCE	MERIC	Emmanuelle
MT AEROSPACE AG	GERMANY	HACKENBERG	Christian
MT AEROSPACE AG	GERMANY	WIEDEMANN	Josef
NEURASPACE	PORTUGAL	MANFLETTI	Chiara
OHB Italia S.p.A.	ITALY	STANGHINI	Marco
OHB SE	GERMANY	TUGNOLI	Matteo
OHB SE	GERMANY	BORIES	Alain
PANGEA AEROSPACE	SPAIN	ARGEMI	Adrià
RHEA Group	BELGIUM	LEURQUIN	Christine
SABCA	BELGIUM	DUBOIS	Marc

Company	Country	Last Name	First Name
SAFRAN AIRCRAFT ENGINES	FRANCE	LANCON	Brice
SENER Ingeniería y Sistemas, S.A.	SPAIN	AYUSO	Antonio
SENER Ingeniería y Sistemas, S.A.	SPAIN	RODRIGUEZ GOMEZ	Diego
SITAE S.p.A.	ITALY	MIGLIORELLI	Marzia
SPACEABLE	FRANCE	CANTEGREIL	Julien
STE IDIRECT	BELGIUM	WILLEMS	Koen
TELESPAZIO SpA	ITALY	ARIDON	Giuseppe
TELESPAZIO BELGIUM	BELGIUM	ROSSI	Federico
TERMA A/S	DENMARK	JOERGENSEN	Carsten
TESAT Spacecom GmbH&Co. KG	GERMANY	SCHÄFER	Gregor
THALES ALENIA SPACE BELGIUM	BELGIUM	MALLER	Ina
THALES ALENIA SPACE BELGIUM	BELGIUM	DIVRY	Bruno
THALES ALENIA SPACE FRANCE	FRANCE	CAMMOUN	Riadh
THALES ALENIA SPACE FRANCE	FRANCE	BEGON	Céline
THALES ALENIA SPACE FRANCE	FRANCE	LARGER	Shahrzad
THALES ALENIA SPACE ITALY	ITALY	ARTIBANI	Viviana
THALES ALENIA SPACE ITALY	ITALY	GATTI	Laura
THALES ALENIA SPACE SPAIN	SPAIN	ALVAREZ	Jose
TNO	NETHERLANDS	COURT	Andy
TTTech Computertechnik GmbH	AUSTRIA	RYABOKON	Anna
TTTech Computertechnik GmbH	AUSTRIA	MAEKE-KAIL	Matthias
TTTech Computertechnik GmbH	AUSTRIA	MASAR	Ivan

Eurospace Members status

As of December 2022

Company	Country
Air Liquide Advanced Technologies	France
Air Liquide France Industry	France
Airbus Defence & Space GmbH	Germany
Airbus Defence & Space Ltd	United Kingdom
Airbus Defence & Space Netherlands B.V.	Netherlands
Airbus Defence & Space Sas	France
Airbus Defence & Space Sau	Spain
ALTEC	Italy
ALTER Technology-TÜV Nord France	France
ALTER Technology-TÜV Nord S.A.U.	Spain
ALTER Technology-TÜV Nord UK	United Kingdom
AntwerpSpace N.V.	Belgium
APCO technologies	Switzerland
Arianegroup GmbH	Germany
Arianegroup Sas	France

Arianespace	France
Avio Spa	Italy
Azur Space	Germany
Beyond Gravity AB	Sweden
Beyond Gravity Austria	Austria
Beyond Gravity Swiss	Switzerland
CGI France SAS	France
CGI Deutschland B.V & Co. KG	Germany
CS Gmbh	Germany
CS GROUP - France	France
CS Romania	Romania
Dassault Aviation	France
Deimos Engenharia	Portugal
Deimos Space	Spain
Deimos Space Romania	Romania
Deimos Space UK	United Kingdom
eGEOS	Italy
Elecnor Infrastrutture e Aerospaziale	Italy
GMV Aerospace & Defense S.A.U.	Spain
GMV GmbH	Germany
GMV Innovating Solutions B.V	Netherlands
GMV Innovating Solutions S.R.L. (B)	Belgium
GMV Innovating Solutions S.R.L. (RO)	Romania
GMV Innovating Solutions SARL	France
GMV Innovating Solutions Sp.z o.o.	Poland
GMV NSL Limited	United Kingdom
GMV Soluciones Globales Internet S.A.U.	Spain
GMVIS Skysoft S.A.	Portugal
Indra Sistemas SA	Spain
Kongsberg Defence & Aerospace	Norway
Loft Orbital	France
MOLTEK	Netherlands
MT Aerospace AG	Germany
Neuraspace	Portugal
OHB ITALIA	Italy
OHB Systems AG	Germany
Pangea Aerospace	Spain
REOSC	France
RHEA Group	Belgium
SABCA	Belgium
Safran Aero Boosters	Belgium
Safran Aircraft Engines	France
Safran Data Systems	France
Safran Electrical & Power	France

Safran Electronics & Defense	France
Safran Engineering Services	France
Safran Filtration Systems	France
SENER Ingeniería y Sistemas, S.A.	Spain
SITAEL S.p.A.	Italy
SpaceAble	France
Telespazio Belgium SRL	Belgium
Telespazio Germany GmbH	Germany
Telespazio Italy Spa	Italy
Terma A/S	Denmark
TESAT Spacecom GmbH&Co. KG	Germany
Thales Alenia Space Belgium	Belgium
Thales Alenia Space France	France
Thales Alenia Space Germany	Germany
Thales Alenia Space Italy	Italy
Thales Alenia Space Luxembourg	Luxembourg
Thales Alenia Space Poland	Poland
Thales Alenia Space Spain	Spain
Thales Alenia Space Switzerland	Switzerland
TNO	Netherlands
TTTech Computertechnik GmbH	Austria