

BRAINSTORMING ON FUTURE SPACE STRATEGY

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CONTRIBUTION OF EUROSPACE

Presentation by Giuseppe MORSILLO

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ASD-EUROSPACE

The Space group in ASD

What should be the main objectives of the future Space Strategy?

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Eurospace's three main pillars

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**Support to
competitiveness**

II

**Promoting the
utilization of space**

III

**Ensuring
non-dependence**

What should be the main objectives of the future Space Strategy?

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Support to competitiveness	Promoting the utilization of space	Ensuring non-dependence
<ul style="list-style-type: none">• European space industry relies largely on its success on the commercial market (43% of industry sales in 2015)• This ensures « value for money » also for institutional customers	<ul style="list-style-type: none">• Implies robust market uptake of space-based services in support of EU policies (e.g. environment, transport, security, border and maritime surveillance, agriculture, energy, etc.)• Requires:<ul style="list-style-type: none">> structured efforts in increasing the awareness about the space potential in user communities> Improve processes for the collection of users' needs and translation into technical requirements	<ul style="list-style-type: none">• Encompasses the capacity to conceive, develop, launch, operate and exploit cost-effectively space systems and launchers• relies on an unrestricted access to state-of-the-art technology, also for dual use purposes

What are the main priority areas for future action and/or further investment (at EU level and other)?

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- Structured involvement of Industry to be organized in the definition of the priorities of the EU Framework programme for R&D (H2020) dedicated to space
- Implementation of EGNSS and Copernicus programmes to be finalized/ evolution to be prepared and supported
- New European operational space programmes to be prepared and launched
 - Synergies between space and **security-related policies** (cf SST, GOVSATCOM, maritime surveillance, High resolution EO, space weather, debris removal)
 - Synergies with other sectors and policies (**climate change monitoring, digital policies**, transport, infrastructure management...)
- Political and regulatory measures in support to the space sector to be defined
 - Procurement policy taking into account the specificities of the space sector
 - Support to export to ease access to new markets (development of an “EU space economic diplomacy”)
 - Frequencies to be preserved
 - New and innovative sources of funding/ market opportunities to be explored
 - Market uptake of space based services to be promoted

What evolution of the current EU space programmes?

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“[...] In the cases of both programmes Copernicus and Galileo, **the ultimate goal of investment in space infrastructures shall be considered as a leverage to serve European policies, downstream user communities’ needs as well as scientific communities [...]**”*

GALILEO

- Coordination scheme of all actors involved
- Evolution of the system’s next generation increasing accuracy
- Confidence in the durability of the services (avoid discontinuity) and of the programme as a whole to be strengthened

- Defence & security user needs to be integrated
- EU institutions to be customers as well as users
- Aim of reaching progressive stabilization of the institutional market (also e.g. adding commitments to services)

COPERNICUS

- Priority on instruments to fit specific instit. needs (e.g carbon monitoring, Arctic...)
- Industry to be offered the opportunity to provide the EU with its own ideas regarding the definition of next generation

**Eurosace contribution to the space strategy for Europe – published in April 2016*

How to ensure the competitiveness of the European space sector in a changing environment?

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Setting the scene: European competitiveness under pressure

- Maintaining success in the open market is vital for the European space industry
- The size of institutional support is a global success enabler – US industry clearly advantaged from this standpoint
- The “Newspace paradigm” in the USA: between conservatism and disruption
 - New actors and processes, increased amount of private funding
- Other space powers with high growth rate to be increasingly considered

The EU space industrial policy: a major driver in support to tomorrow’s industry competitiveness

- Pivotal instrument in view of keeping Europe able to produce and export state-of-the-art systems:
 - Setting the conditions in order to “*maintain and develop a strong, competitive and diversified industrial base in Europe, improving employment and knowhow of the sector*”
 - Ensuring a level-playing field with other major space-faring nations
 - Reiterating a clear willingness to support the competitiveness of the whole supply chain, based on unrestricted access to state-of-the-art-technology (also for dual use purposes)

How to ensure the competitiveness of the European space sector in a changing environment?

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R&D programmes: towards greater involvement and freedom of action for industry

- Crucial vehicles to maintain industry's access to state-of-the-art technology and systems
- Impact on competitiveness and on non-dependence to be significantly improved by:
 - Industry's needs to be better reflected in the structure of the calls
 - Role of industry in the translation of user needs into technical requirements to be considered
 - Role of the manufacturers in the selection of priorities (knowledge of the market demand)

Short term proposals

- **Overall COMPET budget to be increased within a multi-year solid roadmap**
- Structures of the calls to allow more reactivity & open innovation
- **Dilutions of fund to be avoided/ continuity to be secured**, by supporting projects:
 - > **more structured, with larger budgets and over longer periods of time and possibly with slices**
- **Support to IOD/ IOV**
- Improve support to critical components presenting non-dependence concerns
- Support and encourage the participation of space industry as partner in projects under the part « Societal challenges » of H2020: joint calls and multi-sectoral conferences

Longer-term orientations

- **EC and industry to work together on “contractual PPPs”**
- A Joint Technology Initiative-like instrument for space to be experienced in H2020 in view of next MFF
 - > Increasing political support from the European Parliament
 - > The industry is ready to take responsibilities

Transversal

- Implementation rules to be settled to effectively support industrial leadership: requires the lay down and implementation of clear technology maturity goals
- Impact of EU legislation (REACH, RoSH) on industry competitiveness shall be assessed and mitigated
- **Appropriate framework of discussion with industry needed**, i.e. a direct, more formal link between the European space industry and the European Commission

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Consolidation of European institutional markets: filling the European gap

Rationale:

- Structural weaknesses on the European side with impactful consequences for industry

Propositions:

- Embedding space policy in the larger policy agenda of the EC expected to lead to wider institutional needs and further development of space-based applications
- The development of institutional needs and markets should benefit jobs and industry based in Europe:
 - Relevant whenever the use of European space assets fits the European institutional demand
 - Major space faring nations' strategies to be taken in consideration in the definition of the European way forward
 - In line with EC's objective of achieving "security of supply" and technological non-dependence

CONCLUSIONS

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**Support to
competitiveness**

**Promoting the
utilization of
space**

**Ensuring
non-dependence**

- Eurospace fully supports the European Commission's objective to shape an ambitious "Space strategy for Europe"
- Our three pillars are closely intertwined and shall not be treated separately
- The European space industry stands at the entire disposal of EU institutions to further elaborate about its main messages