

EISC Conference

Session: Industrial and Data Policy in European Space Programmes

THE SPANISH
SPACE SECTOR

Madrid, 21st / 22nd September - 2015

TEDAE's overall mission is to enhance the worldwide competitiveness of the Spanish Aeronautics, Space, Defence & Security Industry

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Tecnológicas de Defensa,
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space in
TEDAE



Spain is present in all segments of activity with an increasing level of responsibility and with little overlap between their companies

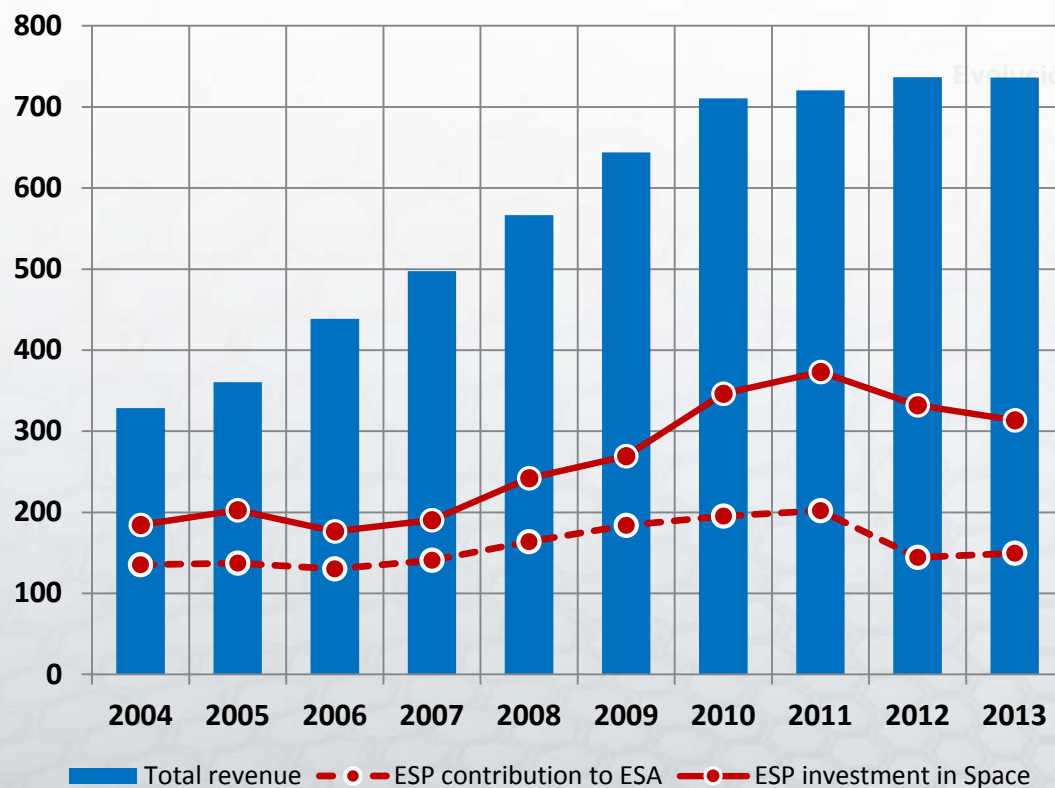
sector's structure

LAUNCHERS	SATELLITES	LAND SEGMENT	OPERATORS	APPLICATIONS	
•	•				AIRBUS, DEFENCE AND SPACE
	•	•			ALTER TECHNOLOGY
•	•				ARQUIMEA
•	•	•			CRISA
•	•	•			DAS PHOTONICS
•	•	•	•	•	ELECNOR DEIMOS
•	•	•		•	GMV
•	•	•		•	GTD
	•	•	•	•	HISDESAT
•	•				HV SISTEMAS
•	•				IBERESPACIO
		•		•	INDRA
	•				MIER COMUNICACIONES
•	•				RYMSA ESPACIO
•	•				SENER
•	•	•			TECNALIA
				•	TELESPAZIO IBERICA
	•	•		•	THALES ALENIA SPACE ESPAÑA

The Spanish Space industry plays a significant role in the European and global context. The Spanish Industry doubled its turnover in a five year period and is ready to become a driver for growth

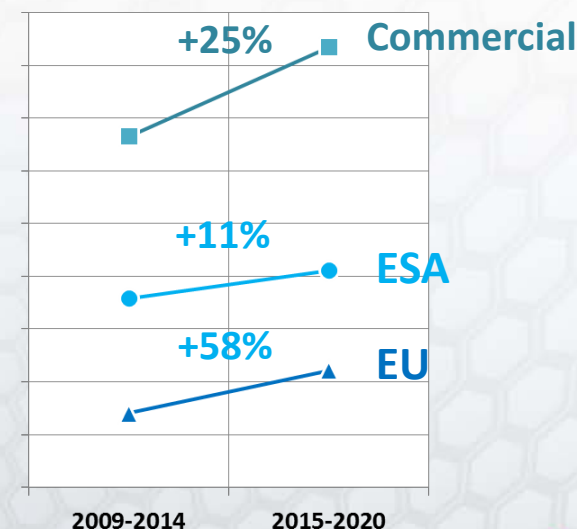
sector evolution

Revenue of the Spanish Space industry



estimated growth of the accessible market for the period 2015-2020

30%



The Space Sector has an enormous potential for growth. The public investment is needed to support a strategy for growth and successfully address commercial space markets

04

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industrial policy

*Should Europe aim at having a common industrial policy for Space in all fields (EU, ESA and national programs)? If yes, what should be the guiding principles?
If no, which should be the guiding principles in each field?*

ESA and EU policies should be very close. There is a need to pursue a coherent and coordinated approach in Europe requiring close collaboration between ESA, EU and the Member States.

- **ESA and EU industrial policies shape the European industry**
[Current European industry is the result of it]
- **The Space Sector requires heavy investment in market-oriented R&D&I**
[ESA Technology programmes and EU Horizon 2020 are key]
- **The Space Sector needs sector-specific industrial policies**
- **Industry needs stable and coherent policies**
[today ESA and EU have different policies and procurement approaches]
 - Establish clear roles and boundaries between public bodies and private industry .
 - Foster the competitiveness of the European industry at all levels (primes, non-primes and SMEs)

Key Issues for Spanish Industry:

industrial policy

- **ESA procurement policy: Importance of best practices.**

- Develop a broad and balanced industrial base where the development of SME's and non-primers is key.
- Preserve and further develop technical competences and competitiveness.

[In Spain: ESA policy in combination with CDTI policies has resulted in a healthy and competitive Industry]

- **ESA and EU procurement approaches should be consistent and adapted to the specificities of the Space Sector.**

- EU procurement policy to preserve special measures of ESA :

To subcontract substantial part of the big programmes [foster participation of SME's and non-primers /avoid monopolization] → Balanced participation of the European Industry.

To monitor and follow-up of an open and transparent competition at subcontracting level.

data policy

Should all European publicly funded space programs have a common data policy? If yes, what should be the guiding principles? If no, which should be the guiding principles in each program?

They should be harmonized by an European data policy

The “Copernicus Free and Open Data Policy” and the Directive on the dissemination of Earth observation satellite data for commercial purposes have led to heavy discussion between the Industry, the European Commission and the Space Agencies.

For the Data Providers, the Data Policy should support the commercialization of data and products and not compete with them.

Therefore, the decision makers should be careful in legislating in this field.

In particular, pay attention for:

- National defense and security interests.
- The image resolutions should impose different data policies, specially the High Resolution Satellite Data.

Key Issues for Spain: :

In general, no harmonized legislation in Europe.

- SAR Constellation from Spain and Germany are working together for a compatible legislation.
- Need to create a framework to compete in fair condition in Europe and world-wide.
Not compatible with a free and open data policy in this case.

[Copernicus free data policy: Very negative impact in the EO data Commercial Industry threatening existing business models and endangering public and private investments made at national (Spain) level]

data
policy



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