

SPANISH PERSPECTIVE ON SPACE GOVERNANCE

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SUMMARY

- 1. Space in Spain - Global View and Strategy**
2. European Governance of Space Activities
3. Conclusions

Evolution of Space activities in Spain

- First space activities in the sixties and seventies through NASA.
- Since the 80's ESA consolidated as main source of investment
- Space sector has moved slowly from just a hand full of companies to a consolidated industrial sector of >700 M€ turnover and >3,400 employees

Main capacities of Space R&D and Industry (I)

- Integration of full satellites , payloads and ground segments
- HW and SW in a broad range of technologies
- Operation of telecommunications, scientific and Earth observation satellites
- Wide scientific community
- Several major programmes running.
Several satellites being built entirely or partially in Spain

- Ingenio and Paz
- Proba-3
- Cheops
- Small-geo



INGENIO



PAZ



PROBA – 3

International engagement

Spain cooperates with the major Space Players

Member of International Bodies



Bilateral cooperation agreements



International Programmes

GALILEO

COPERNICUS

GEOSS

HELIOS

MUSIS

PLEIADES

Commercial Export

EUROPE

AMERICA

ASIA

AFRICA



Strategy (I)

GOALS

- Increase technological capabilities, move higher in the value chain
- Development of Space infrastructures in Spain
- Increase industry turnover and size: commercial and institutional market (in particular EU)
- Use of Space systems to improve competitiveness

ACTIONS

- Significant public investment mainly through ESA
- Focus on key programmes with clear industrial leadership on systems or subsystems
- Launch of flagship programmes: SMOS, Ingenio/PAZ satellites, PROBA-3.

Strategy (II)

- Basic goals still valid for the future but...
- ... a changing environment:
 - Global financial crisis and pressure on public budgets
 - More competition for commercial markets
 - Important increase in the EU role in Space: different rules
- Actions will continue on the same lines:
 - Invest according to financial affordability and following economic recovery
 - Maintain focus on consolidating and improving technical capabilities
 - Better exploitation of commercial opportunities in the commercial market and increase private investment

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European Governance of Space Activities

- ESA has maintained its attractiveness towards member states as an independent intergovernmental organization.
- The increasing role and funding of EU in Space is instrumental to put space at the service of citizens in two major programmes: Galileo and Copernicus
- It is essential to ensure maximum coherence and synergies between national, ESA and EU investments and programmes while avoiding duplication of efforts as much as possible.

European Governance of Space Activities

- Key issues for Spain:
 - **Clear and defined roles** for the actors based on their major strengths:
 - ESA: Technical Agency in charge of development of all European programmes. No need to develop parallel structures at European level.
 - EU: Launch of European application programmes and/or services using space infrastructure .
 - **An Industrial policy** in the EU adapted to the space sector:
 - By ensuring a strong and wide number of companies below “Prime” to preserve competitiveness
 - Avoid tendencies to monopolization and vertical integration

European Governance of Space Activities

- Two very important values of ESA for Member states should be preserved when managing EU space activities: Technical expertise and procurement policy
- In particular the following elements of ESA procurement policy are key:
 - Obligation for the primes to subcontract a substantial part of big programmes
 - Open publication of all subcontracting activities below prime
 - Fair competition at subcontracting level under the control of ESA staff

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Conclusions

- Space is considered as a strategic sector by Spain
- The Spanish Space industry covers a wide range of capacities in Space including the development of complete satellites
- A strong cooperation between ESA and EU is essential for the future of the European Space sector. A stable cooperation must be based on the strengths of both organizations.
- It is of paramount importance to ensure that this cooperation helps maintaining a wide, competitive and geographically distributed Space industry in Europe