



# EUROPEAN PERSPECTIVE: FROM INTERGOVERNMENTAL COOPERATION TO A REGIONAL SPACE STRATEGY

**ESPI / APRSAF Joint Event**

**“Inter-Regional Space Policy Dialogue Between Asia-Pacific and Europe:  
Towards Space Policy for Socio-Economic Development”**

***ESPI Vienna- 22 June 2018***

**Jean-Jacques Tortora**  
*Director*

European Space Policy Institute

# THE EUROPEAN SPACE POLICY INSTITUTE (ESPI)

## Mission Statement

The European Space Policy Institute (ESPI) provides decision-makers with an informed view on mid- to long-term issues relevant to Europe's space activities.

In this context, ESPI acts as an independent platform for developing positions and strategies.

ESPI provides decision-makers and the global space community with:

- Arguments underpinning the “Case for Space”
- Policy concepts for international, regional and national activities
- Analyses for mid-term visions
- Platforms for expert exchanges
- Source for cutting-edge information

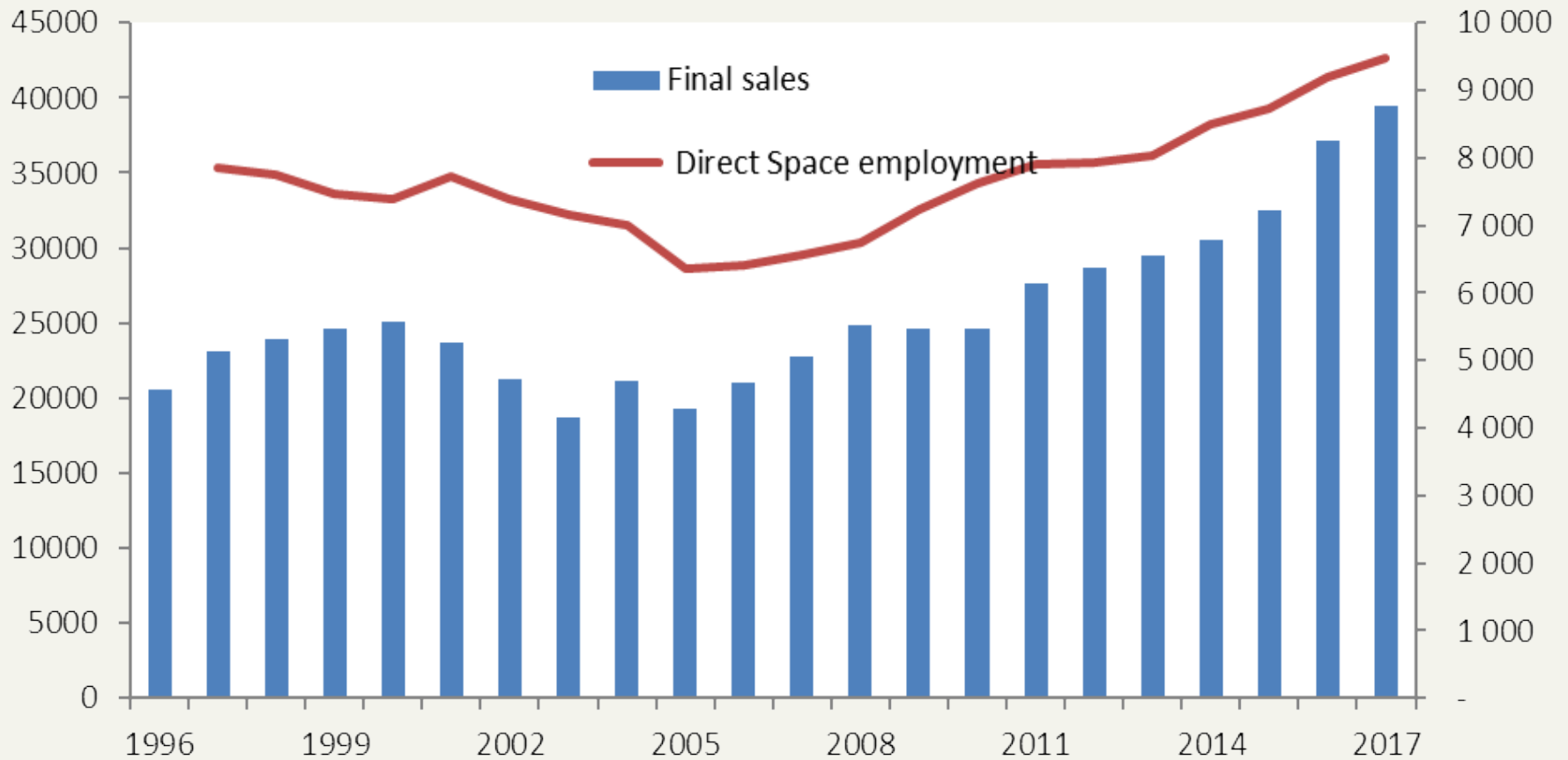


## Europe: A Space-Faring Region

- *Original Concept Invented by Europe*
- *Initially a Small Group of motivated Member States (F/I/D/UK)*
  - Not so Successful in the Beginning
  - 1962: ELDO (Launcher Development Organisation): Europa
  - 1964: ESRO (European Space Research Organisation)
  - 1973: Launch of "Symphony" Satellite
  - 1975: European Space Agency
- **ESA**
  - Pooling of Resources
  - Instrumental in Setting-up a Europe-wide Space Industry
  - Trailblazer in terms of Regional Space Cooperation

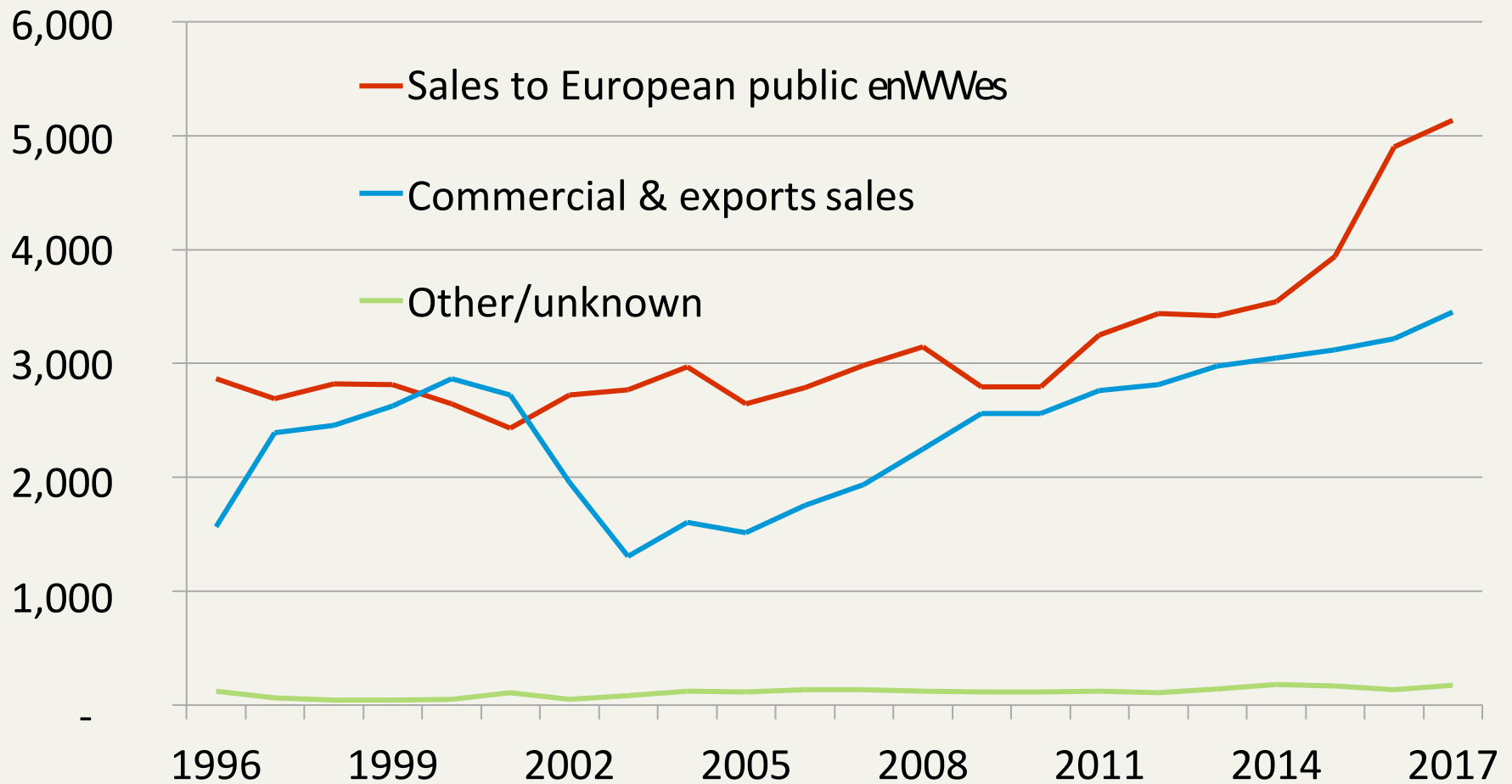
# European Space industry sales (current M€ -RIGHT) & employment (FTE - LEFT)

3



# European Space industry sales by main customer segment (current M€)

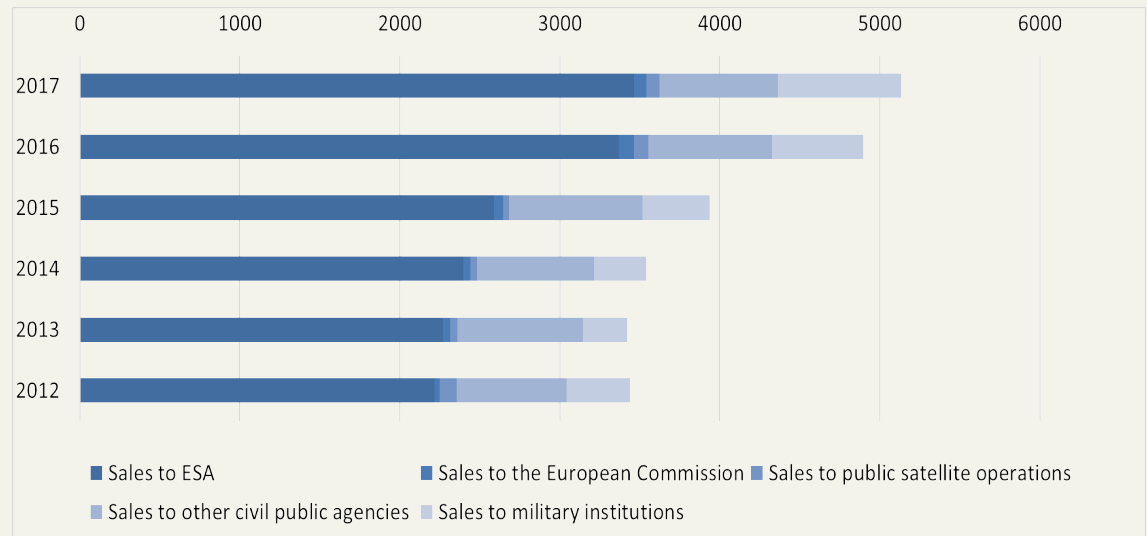
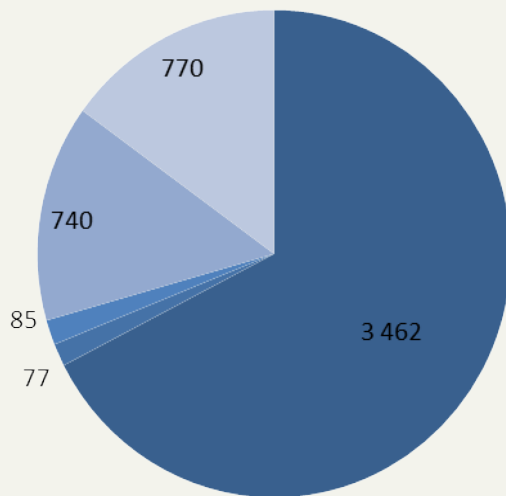
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# European insWtuWonal customers

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- InsWtuWonal programmes promoted by European governments represent more than half of European industry's business (**59% in 2017, 5.1 B€**).



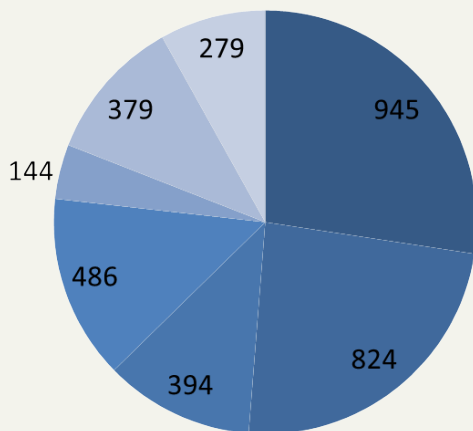
- Sales to European insWtuWonal customers by procuring enWty (M€) 2017
  - Note : among the total Sales to ESA in 2017, the European Commission and Eumetsat programmes delegated to ESA represent respectively an estimated 500M€ and 150M€ worth of revenues for the sector.

# Commercial customers & exports

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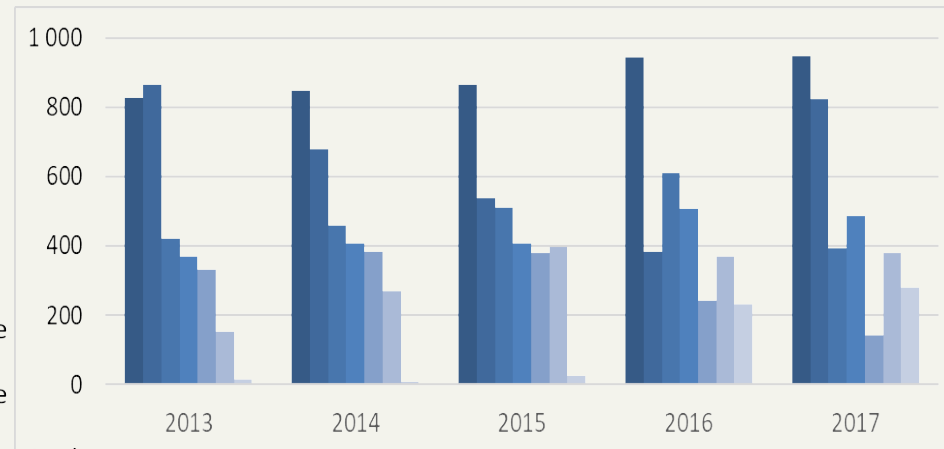
- Commercial markets represent 41% of industry sales in 2017 (3.5 B€).

**EUROPEAN SPACE INDUSTRY SALES -  
COMMERCIAL MARKET BY CUSTOMER  
SEGMENT - 2017 - M€**



- Sales to Arianespace
- Sales to private satellite operators (EU)
- Sales to private satellite operators (RoW)
- Sales to other companies in the sector (RoW)
- Sales to public satellite operators (RoW)
- Sales to civil public agencies (RoW)
- Sales to military institutions (RoW)

**EUROPEAN SPACE INDUSTRY SALES -  
COMMERCIAL MARKET BY CUSTOMER  
SEGMENT - 5-YEAR EVOLUTION**



- **Science and Research**
  - Stable
- **Defence**
  - Structured at National Level
- **Prestige**
  - At Work in Manned Space and Exploration
- **Socio-Economic Benefits**
  - Focus on Return on Investment



- ***Europe Makes Little Use of Space Resources***
  - Stronger Reliance on Commercial Markets
- ***Little Sensitivity to Dependence/Sovereignty Issues***
  - As Compared to Other Major Space Powers
- ***Little Taste for International Competition***
  - Will Never Run a Space Race
- ***Strong Focus on Return On Investment***
  - Short Term Return expected

- **Emergence of the EU as a Space Player in 2007**
  - Bring Space at the Political Agenda of Europe
  - Galileo / Copernicus
  - SSA / Govsatcoms?
- **Funding and Operating of Large Public Space Infrastructures**
  - ESA as the Development Agency
  - Creation of the GSA for Operations
- **Negotiation of International Agreements**
  - Galileo Agreements with the US

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