SME4SPACE

THE REPRESENTATIVE ORGANISATION OF SMES IN EUROPE'S SPACE INDUSTRY

Report on the results of the SME4SPACE survey for the upcoming ESA Council at Ministerial Level (CM25)

Introduction

In preparation of the ESA Ministerial Council Conference, SME4SPACE organised published a survey to its members and other interested companies to provide their position as input. This survey covered wide ranging topics in the space sector, as well as the ESA program frameworks.
Below are the most relevant results of the 86 companies that filled in the survey. The respondents of this survey represent 21 countries, ranging from micro to large companies.

Product development

The first major observation is the importance of product development. This can be found in several of the topics questioned, including space engineering & technology, satellite communications and satellite navigation. In all three topics product development, including competitiveness, was the most voted subject considered important to the success of the company, averaging at 63% of respondents' votes. This highlights that across key domains, product development is consistently viewed as a critical driver of company success.

Launchers

On the topic of launchers and space transportation, the majority of the respondents pointed to the ESA launcher technology development program (67%) and the small launcher challenge (60%) as being the most important to the success of their company, surpassing both the Ariane and Vega programme.

Small programming

Lastly, an important point to be raised is the availability of small programming accessible to SMEs. A total of 83 companies rated the importance of this a 4.4 out of 5. This highlights the growing recognition among companies, even the large ones, of the critical role that accessible, scalable programming solutions play in supporting competitiveness of SMEs.

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However, besides these initiatives there remains room for the large programmes. IRIS² scored very highly among the 76 respondents (71%). It was surpassed only by technology and product competitiveness (76%). These scores suggest that while innovation remains the main driver, flagship initiatives like IRIS² are also seen as pivotal to maintaining industry leadership.

Access to ESA technical & study results

A recurring theme throughout several of the questions was the wish of the respondents to have better access to the technical and study results of ESA. Almost half of the respondents (41%) answered that they did not have sufficient access, either through lack of knowledge of such opportunities or difficulty in accessing it.

Results like these, combined with several comments from the respondents in the qualitative questions, point to a desire of the companies to have more and better access to ESA's technical officer's infrastructure and results achieved, this confirms ESAs unique selling proposition, which is highly valuable and unique in Europe.

Conclusion

The survey results reflect a clear and consistent message from the European space sector: innovation, product development, and accessible programmes are key priorities for growth and competitiveness. Across multiple topics respondents consistently favoured forward-looking initiatives and emerging solutions over legacy systems. Finally, the strong emphasis on the availability of small, SME-accessible programmes underscores the importance of enabling companies of all sizes to participate in the evolving European space ecosystem.