

**SINEQUANET STATUS OVERVIEW
& FINDINGS ON
SME SUPPORT REQUIREMENTS**

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SineQuaNet and the ESA SME Initiative

1. The SME Initiative consists in a variety of measures, ranging from funding of technology actions to delivery of Training.
2. SineQuaNet purpose is to complement the range of actions tailored to improve the participation of SMEs in ESA Programmes, and is not in competition with any other activity of the SME Initiative.
3. In particular, being co-funded by the EC, SineQuaNet cannot cover technology development activities of the type of LET-SME, etc.
4. Its main purpose, is to improve SMEs' skills and competences and thus their participation to the space, but also to improve their competitiveness in the non-space market, in order to help sustaining their business and limiting their over dependency on space

PHASE-A CONTENT & STATUS

WP1: Management

WP2: Development of an SME dedicated web Portal:

Status: Development completed, web launched: <http://www.esa.int/sme>

WP3: SineQuaNet Baseline Definition

- 3.1 Refinement of SineQuaNet Role (review existing Networks, establish cooperation contacts, refine scope for SineQuaNet)
- 3.2 SineQuaNet Legal Structure
- 3.3 Business Model & Logistics
- 3.4 Production of Legal Documents & Templates

Status: 3.1 completed, 3.2 and 3.3 underway.

Scope for SineQuaNet with distinctive, added value will be presented by (Siemon Smid : later today)

PHASE-A CONTENT & STATUS, continued

WP4: Establish SMEs' needs, and compile SineQuaNet Web-based Database for experts & facilities available to give support to SMEs

Status: - An industry survey completed, (results will be presented later).
- Web based database design underway

WP5: Regional Workshops: to inform on SineQuaNet & refine needs

Status: This is the 3rd. (No 1 was in 05/2006, No 2 in 12/2006)

WP6: Industry Space Days: Foster partnership between SMEs and other actors, exhibit SMEs' technologies, inform them on market trends & business opportunities, etc.

Status: Organised last May in ESTEC, attended by some 700 persons, 46 SME' exhibitions and 6140 meetings took place. 1st evaluation Report available.

PHASE-A CONTENT & STATUS, continued

WP7: Case Study: Support to Leiros (F)

ESA to validate a software tool of LEIROS, consisting in a Test generator used to improve the software development process through strengthening and automating the test phases.

Status: See dedicated presentation for details

WP8: Case Study: Support to HOS Technik(A),

ESA to help HOS Technik specifying and optimising the production process of their additives and catalysts used to produce high-temperature resins and polyimides for the plastics and rubber industry, and assess the use of the products for space.

Status: See dedicated presentation for details

PHASE-A CONTENT & STATUS, continued

WP9: Training to be delivered to some 120 engineers, in may 2007

Status: The subjects that have received the highest scores through the industry survey conducted within WP4 are:

- Writing a good proposal for an ESA Invitation to Tender
- Innovation: from R&D to Business development (including Finance sources)
- Electrical, electronic and electro-mechanical components
- Quality & Product Assurance

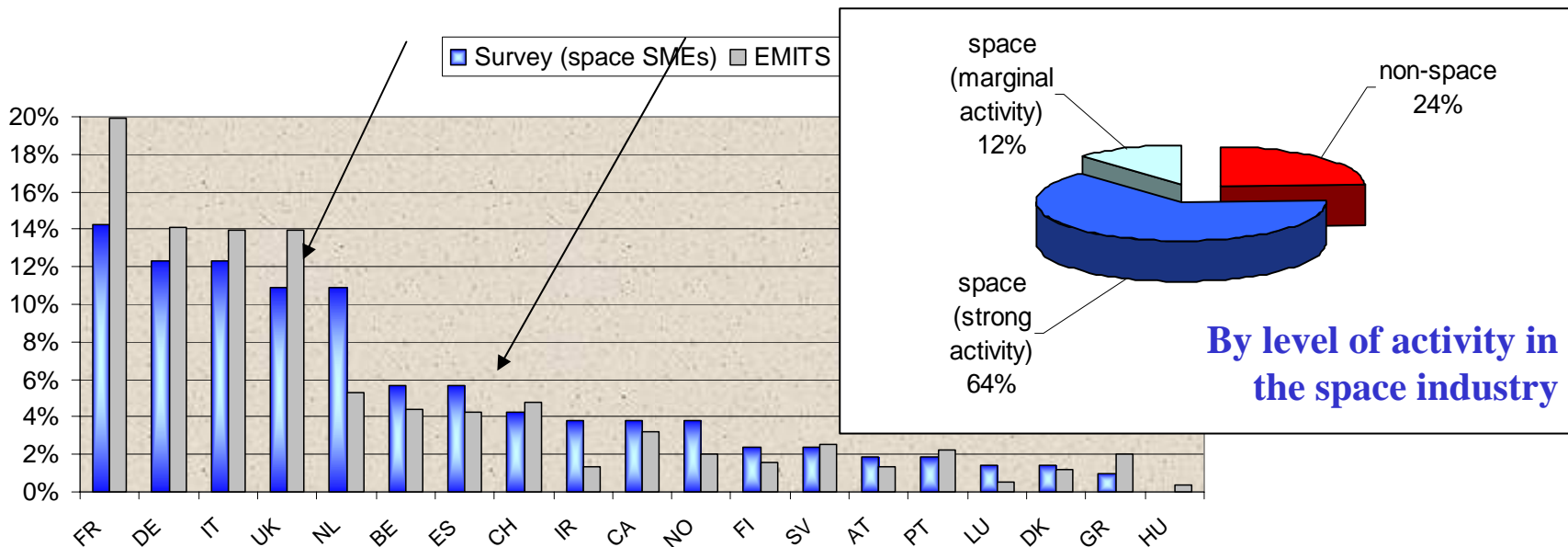
SineQuaNet SURVEY QUESTIONNAIRE

Web based survey conducted during spring 2006:

- **Profile of respondents (activity sector, quality standards, etc.)**
- **Target market(s)** for which the expert support will be used
- **Needs for Space engineering** support (hands-on expert support)
- **Disciplines and/or Technologies** associated with space engineering needs
- **Needs for Project management** support (hands-on expert/Training)
- **Needs for Space product assurance** support (hands-on expert/Training)
- **Needs for access to calibration & test facilities/services**
- **Needs for Training**

279 responses (useable, from 320 received), attitude measurement” class of survey: for 95% confidence level of results, statistical precision : $\pm 5.9\%$

RESPONDENT DEMOGRAPHICS

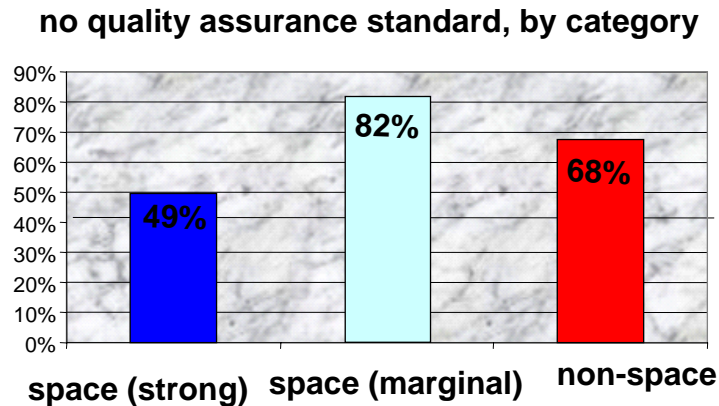
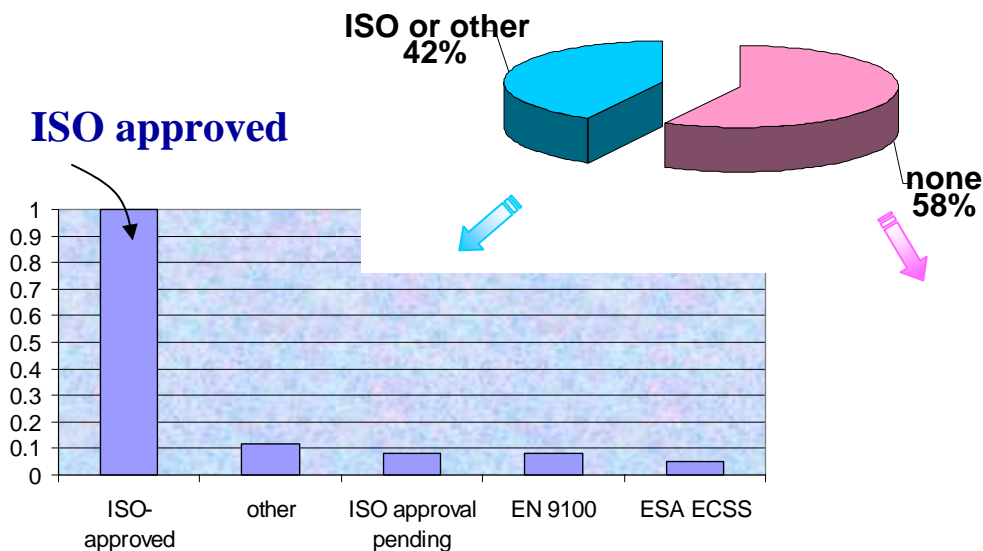


Assessment of sample representativeness against ESA Potential Bidders list

ECSS and other Standards

Qu.: « To what quality standards is your company approved? »

Approval to International Quality Standards



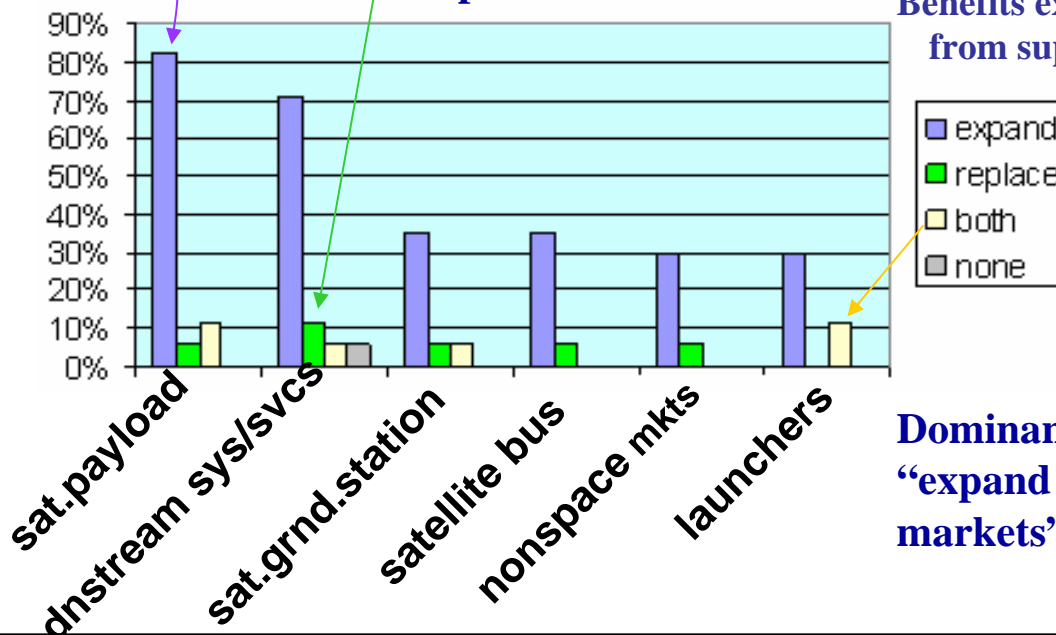
HOW WILL EXPERT SUPPORT HELP THE COMPANY'S BUSINESS?

Example: SMEs with a marginal space activity

Expand business
Into new markets

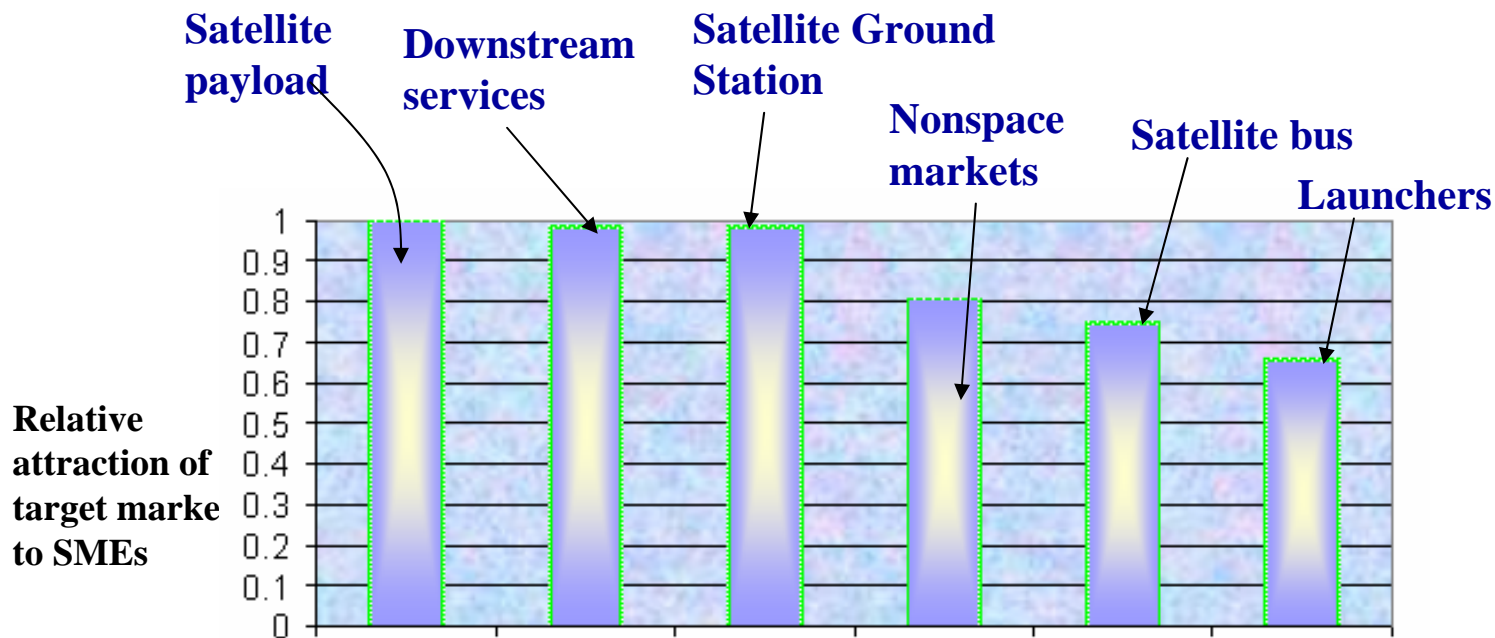
Replace existing
product

Benefits expected
from support



Dominant expectation =
“expand business into new
markets”

THE TARGET MARKETS FOR EXPANSION

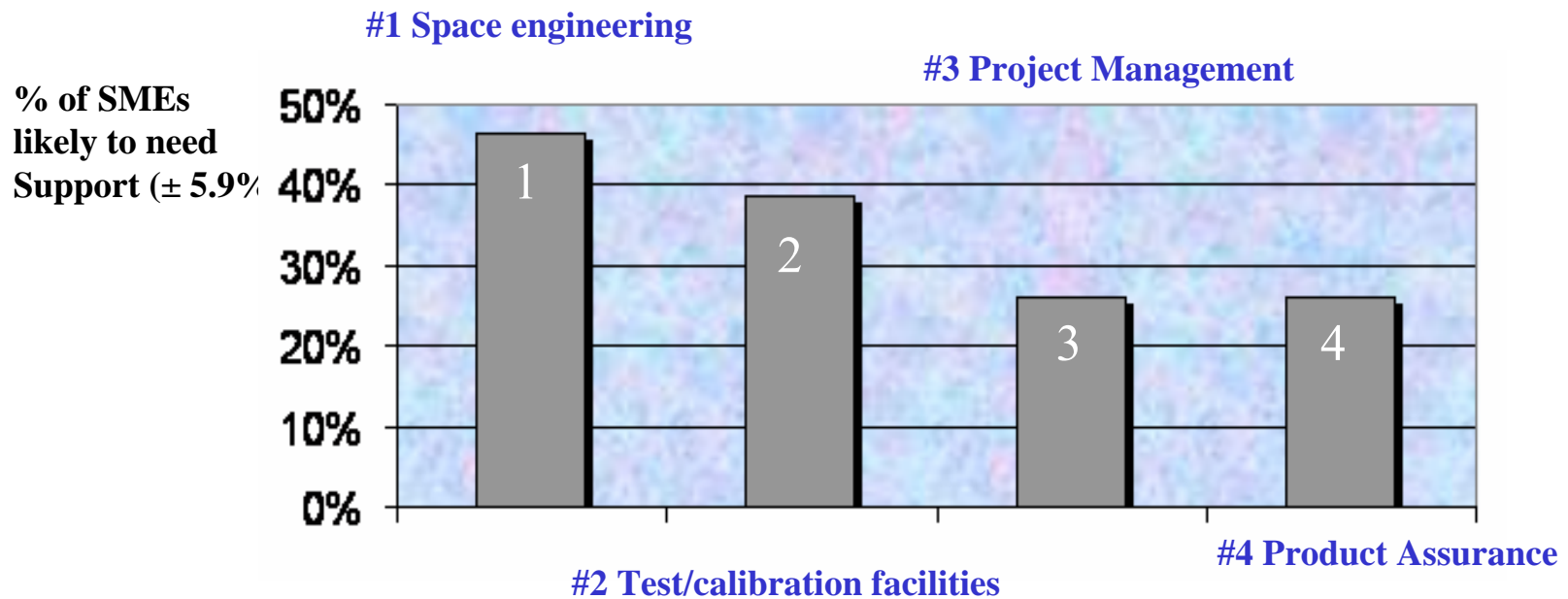


All SMEs=strong + marginal + no space activity

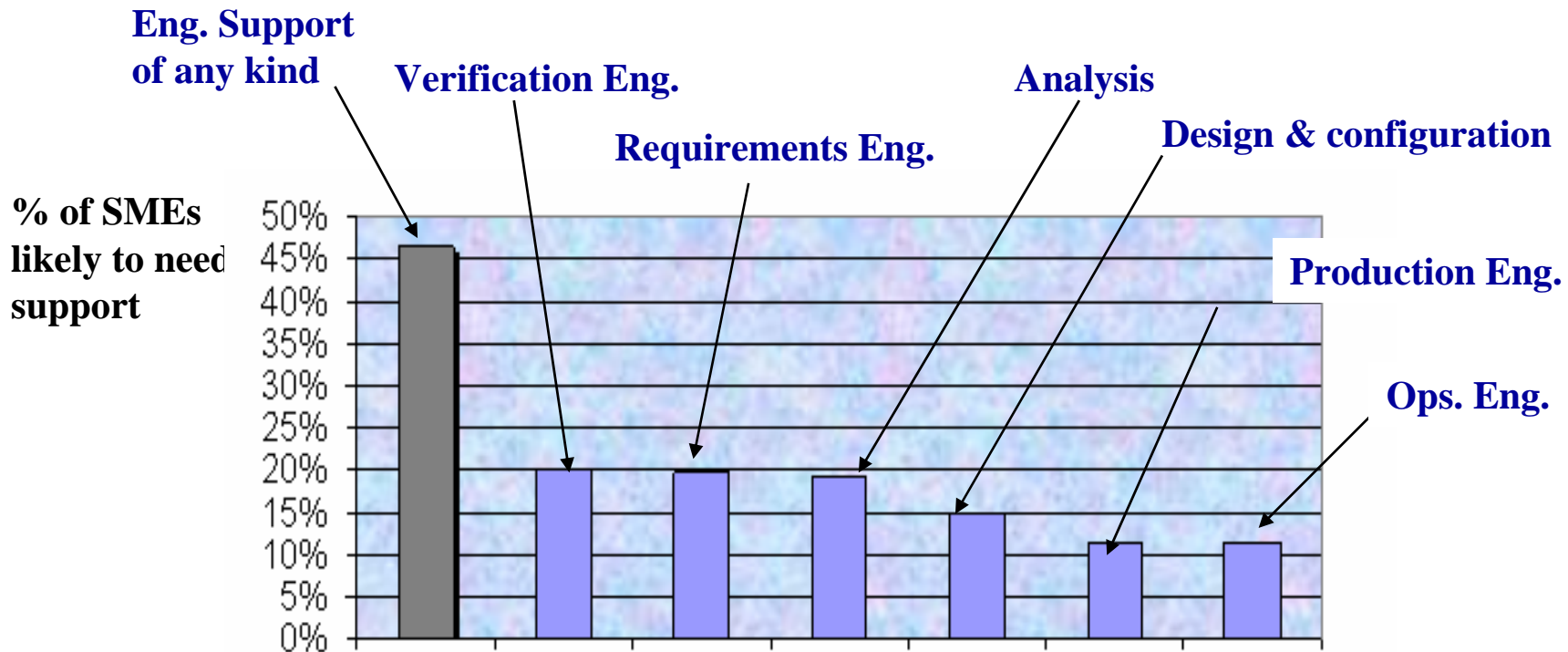
Nearly 60% of the SMEs intend to use the support for business development

AN OVERVIEW OF PRIORITIES

As defined within the survey questionnaire

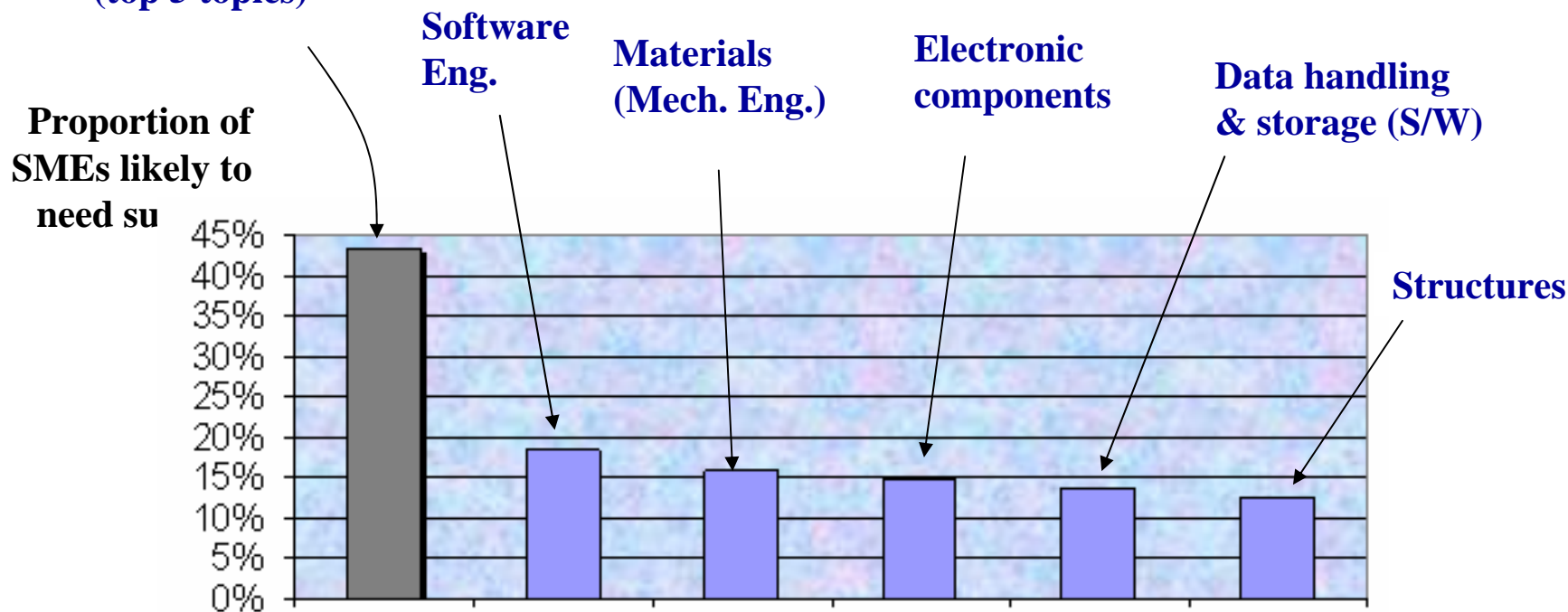


SMES' PRIORITY #1 : SPACE ENGINEERING



ENGINEERING SUPPORT IN SPECIFIC FIELDS

“Eng. Support
(top 5 topics)



PRIORITY #2 : TEST/CALIBRATION FACILITIES

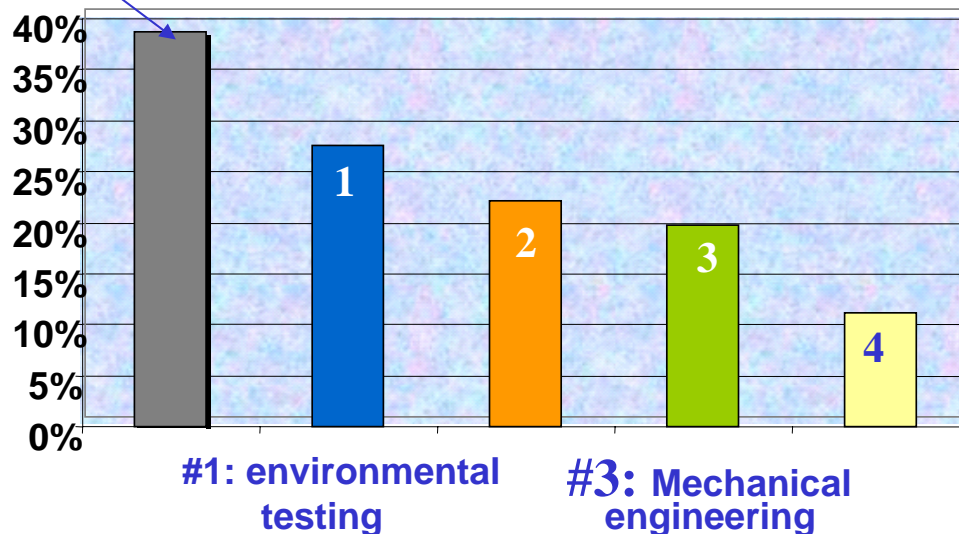
by Category of Facility

Need at least 1 service

#2: Electrical engineering

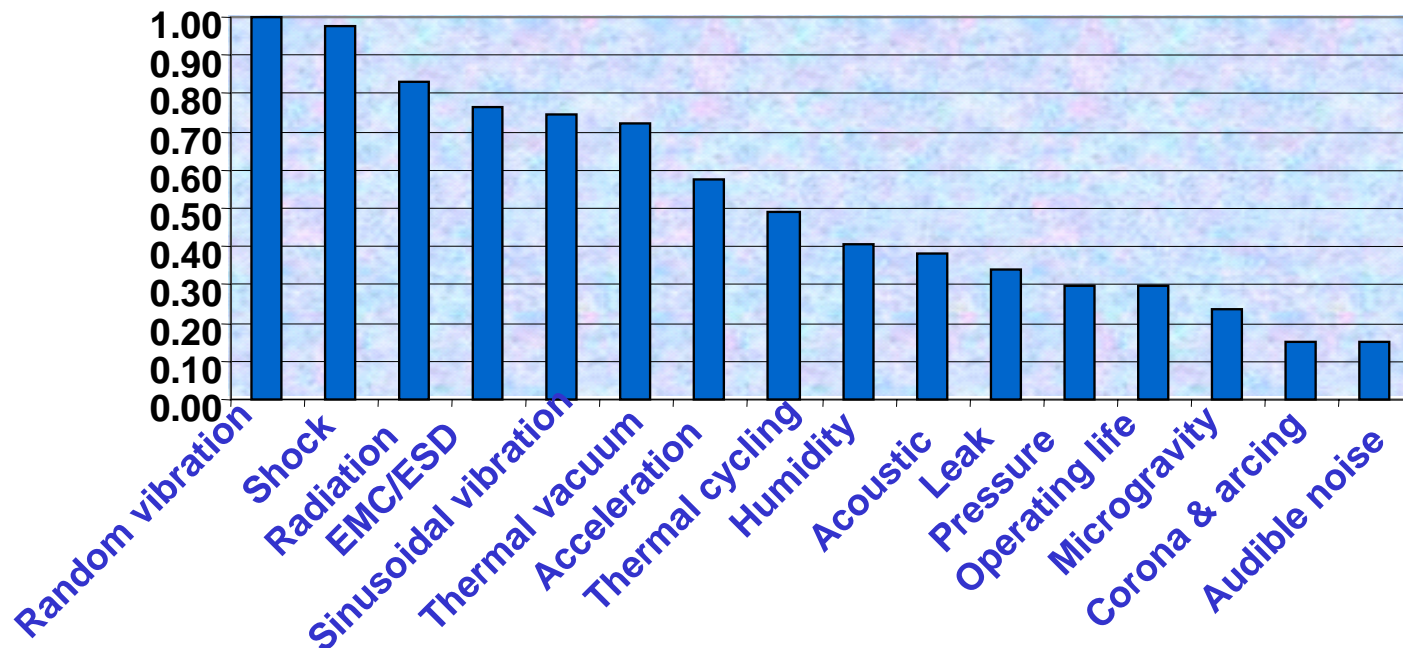
#4: Product assurance & safety

Proportion of SMEs likely to need access

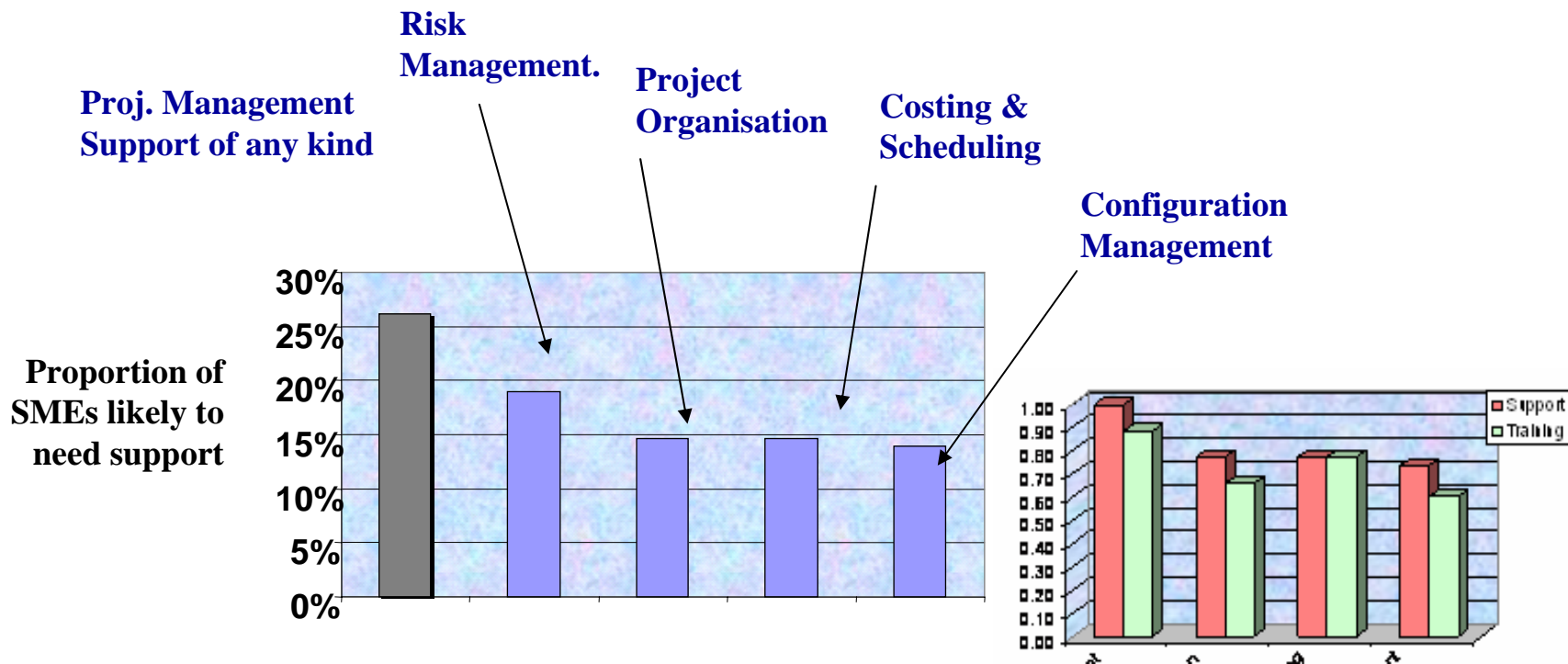


PRIORITY #2 : TEST/CALIBRATION FACILITIES

Details for Environmental testing



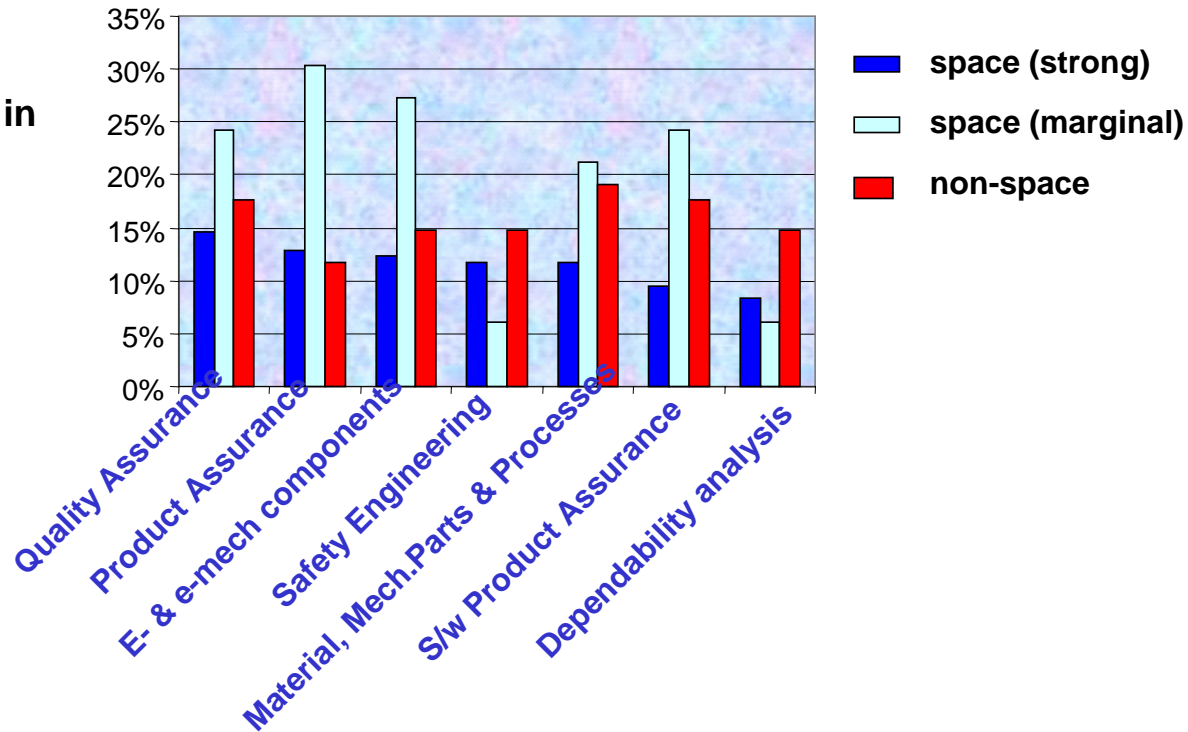
PRIORITY #3 :SPACE PROJECT MANAGEMENT



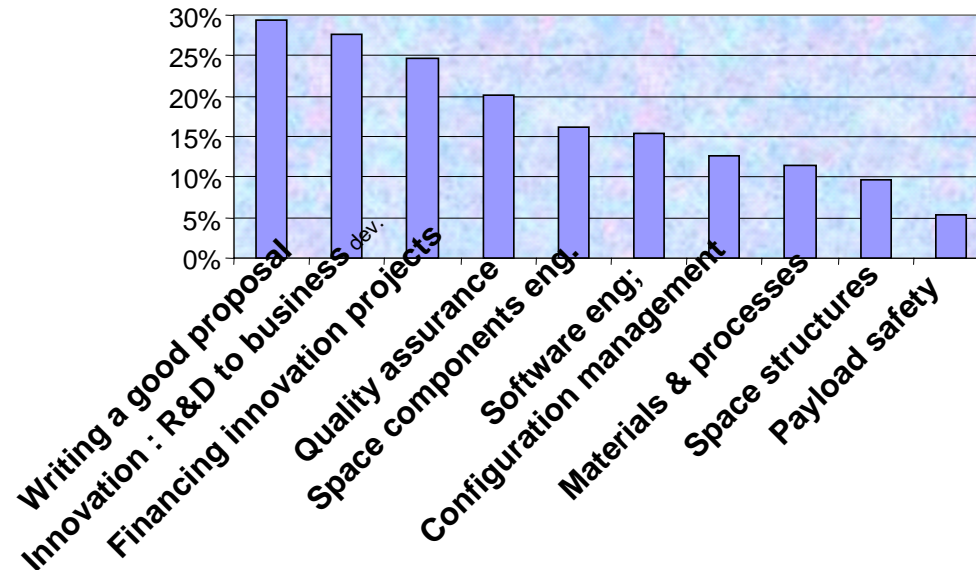
Hands-on expert support?
or Training?

PRIORITY #4 :SPACE PRODUCT ASSURANCE

Level of need
(as % of SMEs in
each category)



SMEs NEEDS FOR TRAINING



Top 3 courses identified as being most useful:

1. “writing a good proposal” (in demand by 30% of SMEs)
2. “innovation : R&D to business development” (in demand by 28% of SMEs),
3. “financing innovation projects”

To Qu.: « Do you need training in space product assurance? », 15 % of SMEs with a strong space activity replied « Yes »

OTHER NEEDS OF SMEs

Not specifically defined in the questionnaire.

Question answered by 154 SMEs, by filling in a free box, using their own words.

Partnership and Business development:	16% of SMEs
Legal Support (including Licensing):	3.2% of SMEs
Mentoring	3.2% of SMEs
Needs for funding:	2.6% of the SMEs
Standardisation:	1.3%
Technology transfer:	1.3%

SineQuaNet meant to support in space project engineering processes & management

but was not meant to help with Partners search; Funding, Mentoring, etc.