



European Space Policy Institute

European Space Summit 2022 – What is at stake?

1. European space at a crossroads

The space landscape has seen considerable structural changes since the creation of the European Space Agency in 1975, when Europe federated the majority of its space efforts under one roof, notably:

- The development of a full-fledged industrial base able to address a broader spectrum of space technologies and activities,
- The emergence of sizeable commercial markets on which European companies prospered,
- The evolution of the EU as a key actor with new space competencies and successful flagship programmes giving rise to long-term public ownership and operation of critical space infrastructure,
- A more prominent international dimension for programme cooperation, commercial competition and security challenges.

Despite Europe’s success in integrating these developments into its approach to space, recent years brought new opportunities and challenges that Europe needs to address:

- Evolved role for space agencies and public institutions in fostering the advancement of space activities,
- Relevance of new procurement and funding models for space programmes leveraging a more prominent role of private actors and investment,
- Profound changes on commercial markets with new competition, innovation & business risk dynamics,
- Shift towards downstream applications and increased societal reliance on space capabilities,
- Resurgence of security and defence dimensions of space,
- Pressing need to address rising space safety and sustainability issues,
- Shifting balance of power on the international scene with new actors and increased ambitions.

These recent developments are pushing Europe to reassess its ambitions and define a future-proof approach to space. The ESA Agenda 2025 is therefore timely in recognizing that European space may deserve a fresh political impetus. In this context, the Agenda proposes to organise a European Space Summit in spring 2022, gathering top European decision-makers to define Europe’s ambition in space for the next decade and announce new European flagship programmes. The Summit is also envisaged to act as a forum for discussions on the evolution of the governance of space in Europe, ensued by a follow-up summit in 2023, where complementary dimensions of ESA’s mandate would be formalised.

2. Positive developments leading up to the Summit

The proposed Summit is envisaged to be organised under the auspices of ESA and EU and held in a Space Council configuration, as the two organizations are increasingly interdependent and complementary in defining a shared vision and building a much-desired whole-of-Europe approach to space.

At the political level, EU-ESA relations have a long and bumpy history, the epitome perhaps being the Space Council, created in 2004 to coordinate activities between ESA and the EU, marked by an 8-year hiatus. The interruption only ended in 2019, indicating convergence on the need to cooperate beyond mere practical arrangements. In recent months, strong signals are underlining the shared willingness by the EU and ESA to further improve relations; first indicated by a joint letter signed by Josef Aschbacher and Thierry Breton, then highlighted by defining strengthened ESA-EU relation as the top priority of Agenda 2025, and culminating in the signature of the Financial Framework Partnership Agreement on 22 June 2021.

The signed FFPA, covering the period 2021-2027, defines the roles and responsibilities of the European Commission, ESA and EUSPA and sets rules of the road for implementing the EU Space Programme and the space component of Horizon Europe. Following the signature, statements from all signatory parties share

a bright outlook for the future European partnership in space, building upon existing cooperation, and now working hand in hand, going as far as establishing joint offices and integrated teams.

The progress made since early March is definitely praiseworthy as major blocking points from earlier drafts of the FFPA have been resolved, (*i.a.* contracting authority, full-cost remuneration and financial liability) completing one of the short-term milestones set out in Agenda 2025.

Despite this rosy snapshot, challenges ahead of Europe go far beyond practical arrangements for programme management. As the FFPA is primarily designed to frame relationships concerning the EU Space Programme, a whole-of-Europe approach to space remains out of sight and questions related to future strategic orientations and high level governance are yet to be addressed. Currently, the European approach seems to be shared between national or ESA Programmes and the EU Space Programme, and despite showcased synergies, the existing setup naturally leads to potential challenges along three dimensions:

- Lack of convergence in the definition of a shared long-term vision, aligning all relevant actors in terms of ambition, technological priorities, industrial policy, procurement models, roles and responsibilities,
- Different membership structure of the EU and ESA, resulting in the consequent risk of international politics interfering with space affairs,
- Risk of unnecessary duplication of efforts and dissociated parallel activities.

3. Space Summit: Building a whole-of-Europe approach to space

These challenges will have to be addressed in light of new European ambitions in domains where both EU and ESA share relevance and interest such as secure communications, space transportation, security and defence applications and space safety and sustainability.

The proposed Space Summit would therefore address a crucial need in the European space landscape by leveraging high-level political impetus to converge on a shared vision and propel Europe towards new destinations, capabilities and governance models, creating a whole-of-Europe approach to space. A key prerequisite for success of the Space Summit is however political willingness and readiness among all involved actors (Member States, EU, ESA) to engage in such discussions and several challenges lie ahead prior to the Summit, notably in building up consensus on:

- The need for discussions to take place at such short notice,
- The space Summit representing the appropriate format for these discussions,
- The decisions and announcements to be made at the Space Summit.

With the advent of mega-constellations and evermore congested orbits, new perspectives for the commercialisations of space systems and applications, resurgence of safety, security and defence aspects of space, increased commoditization of space, revived interest for planetary exploration, and fresh ideas on European human spaceflight capabilities, Europe urgently needs to come up with a shared future vision, and most importantly decide whether it is ready to embrace leadership in space as a political objective.

Once all actors converge on strategic orientations, the vision must be bolstered by developing a modernised and agile governance structure of European space, as suggested by ESA Director General through Agenda 2025, recurrently confirmed by Commissioner Breton, and also addressed by his predecessor who proposed establishing a European Space Council ([ESPI Brief 29](#)). Designing efficient governance while protecting the interest of all EU and ESA Member States is an inherently complex challenge requiring many minds, hours, compromises, and perhaps even creating the need to revisit some articles of the ESA Convention on the way towards the Agency's 50th anniversary in 2025.

The proposed Space Summit, therefore, represents a welcome addition to the inter-institutional setup, and an opportunity to address space matters at the highest political level, giving more leeway for strategic and vision-driven decisions, paving the way for Europe to expand its excellence, relevance, competitiveness and autonomy.

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European Space Policy Institute, ESPI
Schwarzenbergplatz 6 • A-1030 Vienna • Austria
Tel: +43 1 718 11 18 -0 / Fax: -99
Email: office@espi.or.at

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