



*17<sup>th</sup> Autumn Conference*

**European Space Governance in  
a Transforming World**

***KEY TAKEAWAYS***

24 - 25 October 2023  
Urania Observatory  
Vienna, AT

## *An Outside-In Perspective*

In ESPI's 20th year, in October 2023 at the Urania Observatory in Vienna, ESPI welcomed about 200 guests from over 45 countries to the 17th ESPI Autumn Conference.

This year's conference theme was "European Space Governance in a Transforming World", acknowledging the transformation of the space sector globally and addressing the question of how this revolution surrounding Europe compares to the (r)evolution within Europe, and how European Space Governance may need to evolve to allow Europe to be part of and a leader of this transformation.

The flow of the conference provided for an outside-in perspective, including perspectives from India and the US, as a contrast to the European landscape. **The outside perspective gave evidence of forces driving space from beyond the perimeter of space agencies, such as political vision and will and cultural mindset of nations. This was identified as strong contrast with the situation in Europe.**

In particular, the panel discussions highlighted a prominent difference in approach, with established and rising space powers setting up ambitious space missions with a determination to implement within challenging timelines, while Europe often is slowed down by time-consuming discussions on roles and responsibilities, the "how" falling short in setting clear policy goals and challenging itself with a bold objective.

However, the increasing magnitude of geopolitical challenges, conflicts on European soil and in our neighbourhood, the climate crisis, and economic concerns are forcing **European actors to seek pragmatic ways of working together with increased synergies, to reevaluate their roles and to jointly define ambitious goals in space, including as partner of global level.**

# TOP 8 TAKEAWAYS

01

## EMPOWERING SPACE: THE IMPORTANCE OF THE WIDER ECOSYSTEM

Political and societal ambitions have proven crucial to engaging with citizens and catalysing their interest in space. Chandrayaan-3 successfully landing on the Moon's South Pole is a historic achievement and remarkable accomplishment that affirms India as a prominent actor in space exploration, as well as in the space domain at large. The mission demonstrates how ambitious space missions can boost national pride, empower upcoming generations, and inspire humankind at large, while being part of an industrial strategy. Similarly, the United States, with its deep-rooted national interest in space defines ambitious missions and views space exploration as a domain of inspiration, while providing the basis for the development of commercial launchers and space applications. **In Europe, space still needs to find its place in the wider ecosystem.**

## THE PLACE (AND PACE) OF EUROPE: COMPARING SPACE AMBITIONS

Europe has yet to reach its maximum potential in space. While the economic and scientific domains of space are being addressed, **the political and security dimensions of European space capacity are still being largely ignored.** Speakers during the Conference made it clear that for Europe to play a leading role in the new space race, it needs to address the shortcomings in its current approach. Different visions and ambitions between Member States and the increasing importance of national strategies still result in a fragmented Europe, compared to the United States' more centralised policy making and management of space, with MoD budgets playing a crucial role in supporting innovation also available to NASA, and with a culture of straight talk at the political (Congress) level, and with civil societies as advocates and influencers.

02

03

## THE SPACE ECOSYSTEM MUST EMBRACE A BROADER ECONOMY

Space is dominated by public budgets, representing 85% of the total financing of the space sector. The space ecosystem must embrace a broader economy, particularly in satellite communication and space applications, which should be seen as an integral component of the vast European and Global digital market. It is furthermore imperative for Europe to develop new markets and enable the entry of space into other industrial sectors. In addition, Europe needs to address the fragmentation of the European and national funding programmes, with the latter often not well known to new space companies. **Efficient governance should address this challenge to significantly attract funding for space also from outside the space sector.**

# 04

## ADDRESSING & HARNESSING COMMERCIAL SOLUTIONS

The conference highlighted the importance of well-defined risk and benefit sharing frameworks between public and private actors. Past conditions, including low interest rates enabled the emergence and growth of startups, and have significantly disrupted the global industry. Public-private partnerships **stimulating entrepreneurial dynamics and the sharing of risks and benefits was considered a vital push, not just to sustain industrial dynamics, but to enforce European competitiveness globally.** Culture change, flexibility, and agility are also crucial elements in adapting to the commercialisation era, ensuring Europe remains competitive while retaining strategic capabilities and supporting commercial ventures. Europe has yet to fully make use of new companies and business models to reinvigorate its industry. EU initiatives like IRIS<sup>2</sup> could exemplify public-private collaboration and their success is essential in harnessing commercial solutions.

## GOING BEYOND INDUSTRIAL POLICY

Alignment between public and private objectives - especially, the balance between national security requirements and commercial and industrial interests - is essential for European success in the space domain. The aim should be to shed light on how to prioritize in an increasingly multifaceted environment, consisting of established and emerging industry, R&D actors, policymakers, investors, and **increasingly diverse user communities. In particular, the discussion should go beyond a focus on industrial policy and direct industrial return towards frameworks that serve the broader set of strategic European and national policy objectives.** Furthermore, sustainable governance for the future will imply ways to continue to attract and retain talents and inspire the next actors and leaders of the industry.

# 05

# 06

## GET SPACE OUT OF THE SPACE BUBBLE: DEEP VERTICALISATION

The task of the decade may be to move space beyond the established space bubble. Showcasing and proving how vital established space applications (in Earth Observation, PNT, Satellite Communications) are beyond the space sector, exemplifies how space can be a core facet to digital strategy, transport infrastructure, climate change mitigation, as well as strategic capabilities in security and defence. Several stakeholders pointed to the importance of moving beyond traditional space markets. Participants commented on mixing satcom with terrestrial infrastructure as a new avenue to get the space sector out of its niche market. **The entry of digital giants, such as Amazon and Microsoft, within the space sector also demands a re-examination of the existing ecosystem and power and governance dynamics therein.** Speakers highlighted that only by embracing this paradigm shift, we can unlock the full potential of space.

## SECURITY & DEFENCE: A MATTER OF UTMOST URGENCY

Beyond climate-induced crises, Europe faces challenges in the form of geopolitical conflicts and war. The Russian invasion of Ukraine has triggered a major disruption in Europe's relations with Russia. Geopolitical crises are forcing European nations to reconsider their defence strategies. While space has proven fundamental to supranational European security, **the funding shortcoming in space for security and defence is acute and exposes Europe in comparison to global space powers.** As highlighted in the conference, there is an evolution towards de-tabooing security and defence discussions, which is a positive trend for Europe's strategic positioning. In the absence of funding fire-power equivalents to the U.S. DoD or Space Development Agency (SDA) at the European level, **a key policy push will be required to enhance dual-use approaches that make use of those institutions and capabilities that already exist, including ESA.**

07

08

## SPACE AS A TOOL OF DIPLOMACY & INTERNATIONAL COLLABORATION

ESA and Europe have a long history of international collaboration. The Conference participants reaffirmed the power of space as a force for diplomacy, recalling the importance of close ties and meaningful, long-lasting cooperation through institutional and commercial missions. For instance, ESA and the US have long historical links. Yet, it is by extending its work with neighbouring regions, as well as engaging with emerging countries and actors with increased ambition willing to take risks, that mutual benefits can be derived in the fields of economic development, climate change mitigation, and rapid crisis response management. **Europe needs to be part of the strategy/reflection of major international programmes and establish leading roles and strong partnerships with international collaborators.**

*The 17th Autumn Conference solidified ESPI's role as the European think tank for space serving as a pivotal platform for European space discourse. Speakers and attendees emphasised the Institute's ability to convene diverse perspectives and insights, highlighting the necessity for incorporating new members from varied countries, backgrounds, and organisations to continue enriching dialogue. Finally, participants underscored that ESPI acts as a catalyst for the process of bringing space and policy closer together, including further work on governance.*

### FUTURE WORK

#### ESPI Recommendation for a Blueprint for Space Governance

As a follow-up to the conference, ESPI will perform further work in support of collaborative and transparent European space governance. This will include analyses of current European space governance, and contextualizing Europe's approach in the broader international context. Considering prevalent geopolitical upheavals, such as the crises in Ukraine and the Middle East, there is a pronounced call for ESPI to augment its contributions to security and defence discussions, ensuring that these critical dimensions are adequately addressed and reflected in European space governance. In line with *ESPI2040*, a policy vision for Europe in space, ESPI will draft recommendations for a future European space governance, including European Security and Defence.



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