

PERSPECTIVES

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SEVILLA SPACE SUMMIT – “ZEITENWENDE” OR A REVOLUTION POSTPONED



After the ESA Council Meeting on Ministerial Level in Paris, the ESPI Perspectives heading of November 2022 was **“Success within political boundaries – but widening the gap”**. A year later, similar could be said concerning the joint EU-ESA Space Summit of Sevilla. The Summit comprised an ESA inter-ministerial meeting and an informal ministerial meeting on competitiveness (space). It clearly advocated for enhancing Europe’s role in space and included statements on a strong EU-ESA partnership. ESA Member States again voiced their full commitment to ESA. The Summit confirmed views regarding the European dimension of space and that space is on the agenda of all European economies and societies, within the EU and beyond.

The Summit took place at a time of increasing geopolitical crises, major security concerns, conflict and war in Europe and its neighborhood. At a moment when time is of essence in not only monitoring but in acting and managing the impact of climate change. At a time when India just landed on the Moon. While the Summit is not a milestone for funding decisions, it is a unique opportunity for the space community, for ministers empowering their agencies and industry, to not only send a signal of bold ambition for a strong Europe in space and partner to the world, not only putting space at the service of policy objectives, but to take action in response to burning European and global challenges, at scale.

At the Space Summit 2022 in Toulouse, the French president Emmanuel Macron defined space as an expression of the strategies of political power, including the security and defence dimension and space as part of the vision we stand for in the world. Yet, when measuring the 2023 Space Summit against Europe’s ambition to become an autonomous space power, next to the U.S. and China, there has been little evidence of concrete and timely action at a scale needed to avoid a continued widening of the gap between Europe and other world regions. Certainly, the new ESA partnership with the EC’s DG for Climate Action constitutes an important step towards the implementation of the Accelerators, and the Space for Green Future Accelerator found wide political support in Sevilla. Certainly, the planned opening up of the launcher sector to intra-European competition, can become a game changer, and the launch of a competition to deliver commercial space cargo return services by 2028 also points in the right direction, to transform and stimulate the industrial base. It may indeed become the seed of a required “Zeitenwende” for the space industry in the future.

However, speed and scale matter and beyond statement of ambition, the funding required for a new level of ambition involved for now remains two orders of magnitude below that engaged by global competition in exploration and security. Only 2025 might bring change. One of the biggest misconceptions voiced at the Summit was that when comparing European budgets with other regions, the biggest difference would not be the public side but on the private end. With a public space budget share of GDP in the range of 0.05% in Europe compared to about 0.25% in the U.S. space in Europe fails to live up to its full potential. Despite the economic power, heritage and skills available in Europe. 85% of space budgets worldwide are public and it would be misleading to interpret the increasing private investments in space as a message that public lead, direction, finance and political will could be reduced. For Europe it is rather the opposite, as Europe’s leading economy currently is unfortunately reducing its space budget.

The 2023 Summit clearly was more focused on the space ecosystem itself, e.g. did not address the security dimension and the role and power of space for prosperity, peace and future generations, in revitalizing economies and boosting the competitiveness other industrial sectors. This is also visible in the launcher discussion, which focused on the supply-side but did little to address the demand-side. How beyond European institutional missions – few when compared to launch manifestos globally – **Europe would stimulate the emergence of a European internal commercial market**, when **Cape Canaveral suffers launch congestion**.

A lot now will depend on what ESA together with its Member States will bring forward in an “ESA 2040” strategy, as a foundation of ESA CM25. The High-Level meeting planned under the Belgium presidency of the EU Council will be a critical milestone. It is hoped that this strategy will address all 3 levels of action (Policy Impact; Space Capability & Autonomy; Foundation) as advocated in **ESPI2040 vision**, and most importantly how space can become an integral part of other policy domains, including security and defence, energy, mobility, digital and green and how space can support the business strategies of entrepreneurs, Fortune500 companies and investors in pharmaceutical, automotive, food & agriculture, telecommunications. This opening up of space to the wider economy and society could ultimately constitute the “European way”. It may be the way to unite Europe behind a holistic strategy, supported by strong political will.

Yours sincerely,



Hermann Ludwig Moeller
Director of ESPI