

EUROPEAN SPACE CONFERENCE SHAPING EUROPE'S FUTURE NEW 2040 HORIZONS

The new year's debate in Europe on space always starts with the European Space Conference in Brussels by Business Bridge. The 2024 edition "Shape Europe's future" delivered a record attendance of 2000+ participants. It brought a new level of **ESPI contribution**, with two ESPI sessions on "Europe's Road to space power" and "A vision for Europe in space in 2040", together with panel moderations with Heads of Agencies, on Global Partnerships, Exploration, Cybersecurity and Space Traffic Management.

The conference succeeded in its forward-looking ambition and 2040 indeed a defined time horizon of many speakers. Headlines included "Autonomy", "Industry", "Cooperation", and to an unseen extent "Defence", with statements such as "The time of blue eyes is over" (EC). Yet, a number of mission-critical topics were missing from a conference pre-dominantly focused on Europe. The international dimension of space, with less than 4% of international speakers, was absent from most panel discussions. There was little mentioning of China. It was the ESA DG, asking to look at the world around us, pointing out the global space race. And while talent indisputably is part of the foundation of any future, the topic did not find much consideration. Exploration received spot-light attention with a live link to the ISS (ESA), but the "Revolution Space" called upon by the **HLAG report** still seemed to be largely on hold. Science appeared to be entirely absent from the debate.

What took center stage was the debate on Europe's space industry ecosystem (with most conference partners coming from the upstream segment), asking for an industrial policy. Industry is feeling threatened by a low level of institutional demand, which represents a true risk to its future and required supply chains. While ESA was acknowledged as #1 institutional customer (Eurosace), it was clear that more was needed. Competitiveness on a global market requires a "good home base" (EC), a strong European internal market to build from. It was stressed that any space capability, including in security & defence relied on a strong economy and sustainable industrial base, able to deliver innovative solutions.

The launcher sector stood out, and next to its numerous new entrants in small launchers, it appears that Europe is entering the age of space ports, similar to seaports

centuries earlier, adding to its resilience. The EC voiced ambitions to include launchers, incl. R&D, as part of the future EU space programme (EC) (the actually available EU funding for such ambition may be a challenge).

There were diverging opinions on whether Europe is a space power. While the leading role with Copernicus and Galileo provide an excellent foundation, promoted by EUSPA, it remains ESPI's view that in the absence of an equally strong Security & Defence and a Human Exploration component, Europe is not (yet) a space power.

There still is a lack of political will to translate ambition into funding, enabling action. EIB, with "Houston, we have a problem", quantified an enormous funding gap between Europe and the U.S., of \$38B/\$40B for upstream/downstream respectively. It was made clear that an effort to narrow down these gaps required verticalisation (EC), to connect space to other sectors of politics, such as transport and digital and obtain funding from these sectors beyond the perimeter of EC DEFIS and ESA funding lines. (Indeed, the Accelerator initiative proposed by ESA is based on this logic). Following a similar line, industry (OHB) called for technology riverbeds to be defined, to bring innovation into other industry sectors, e.g. the combination of space (EO, PNT, connectivity) and AI for geo-spatial intelligence.

May be most importantly, there was a clear call for "breaking the silos between space and defence" and the call for "we need to invest more" (EEAS), to get beyond the Space Strategy for Security and Defence to a "We have to do it!". The Dual-use potential was underlined many times as something to be exploited much further.

There was general agreement that 2024 was going to be a decisive year and that ESA CM25, CM28 and MFF 2029- would need to be aligned, with a joint plan and priorities to ensure Europe's future in space in the 2040 horizon. Sustainability may be a Leitmotif for such European vision. ESPI will continue to provide independent recommendations and proposals as presented in **ESPI2040**. Beyond regulations, rules, and governance discussions, Europe needs funded space programmes and projects for industry to implement, to provide solutions to society and the economy.

Yours sincerely,

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Director of ESPI

