



Towards European Leadership Space Power at Scale

Hermann Ludwig Moeller, Director of ESPI
24 June 2024, European Space Forum 2024, Brussels

“...to make Europe a global leader by 2030 in five of the most emerging and strategic sectors.”

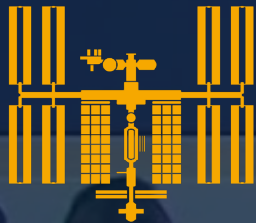
E. Macron, Europe Speech, Apr 2024



Artificial Intelligence



Quantum Computing



Space



Biotechnology



New forms of Energy

*“ We need to reaffirm the goal of **3% of European GDP** assigned to research. ”*

Scaling Europe's ambition in space



Macron

Status quo Europe

ESPI 2040 vision

Status quo USA

*ESPI calculation derived from the call for **3%** of Europe's GDP on **research**, to foster Europe's leadership in five emerging and strategic sectors*

*Currently at the level of **0,07%** of Europe's GDP*

*European public space budget at **0,15%** share of Europe's GDP*

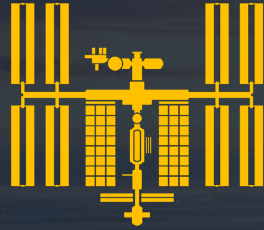
*Currently at the level of **0,24%** of U.S. GDP, majority originating in **defence & intelligence***

\$7.9T

estimated wider benefit of space on the overall economy by 2040

The Space Multiplier...

Space



Market size >

6-7x

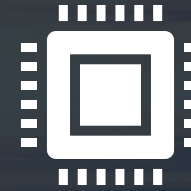
Multiplier effect >

Batteries



8-9x

Semiconductors



6-7x

Pharmaceuticals



6-7x

...In sectors of policy & economy

Security & Defence



Transport & Mobility



Weather & Climate



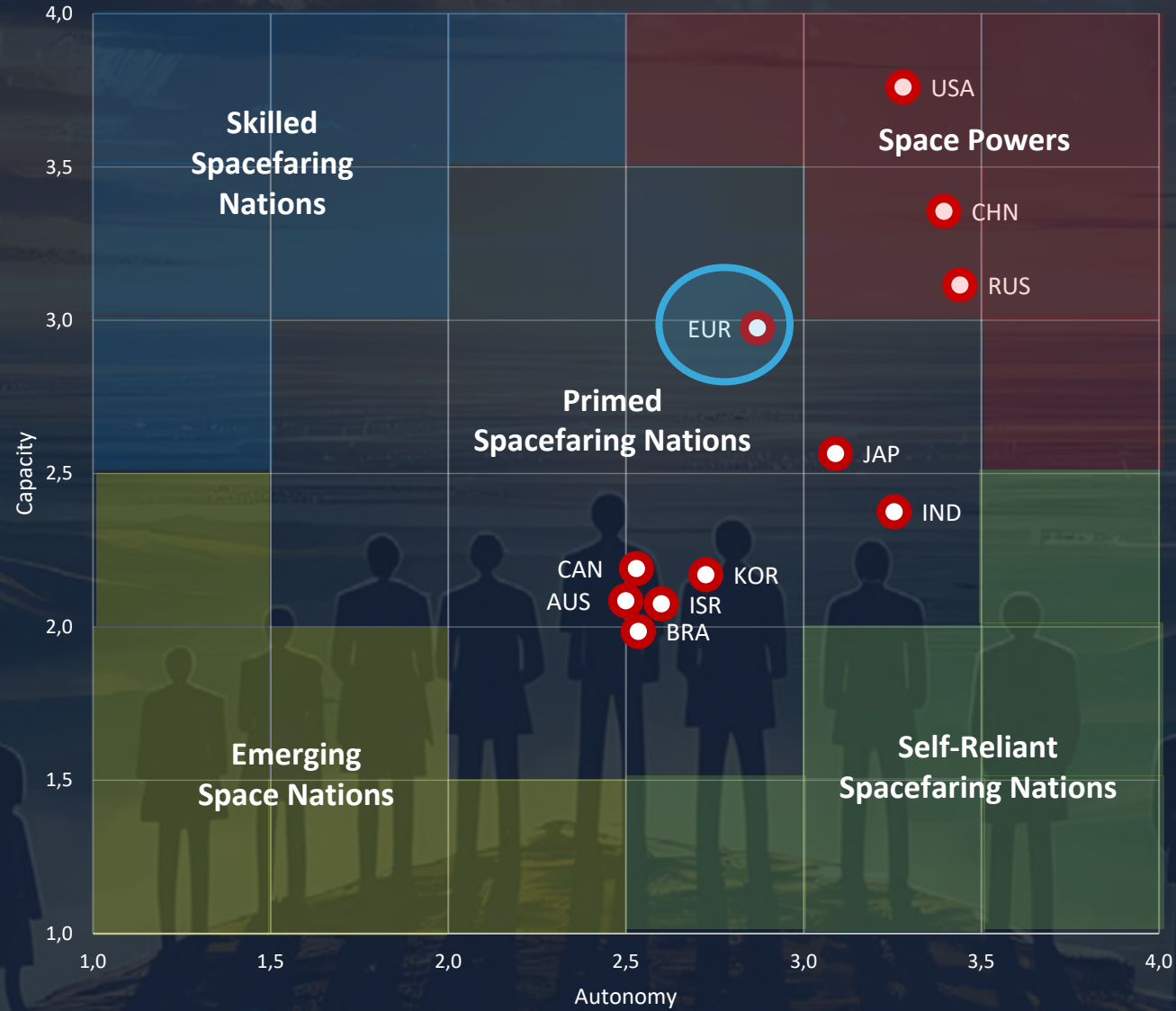
Telecommunications



Food & Agriculture

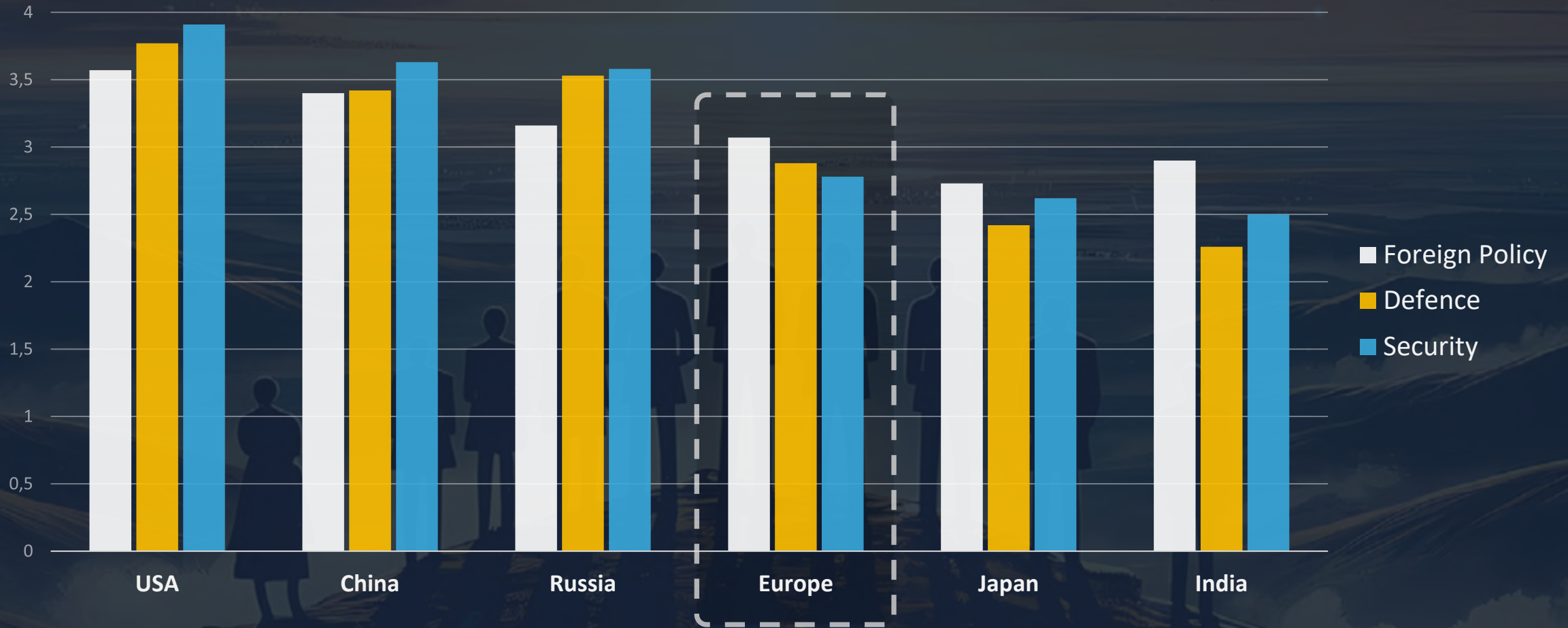


Europe – a Space Power ?



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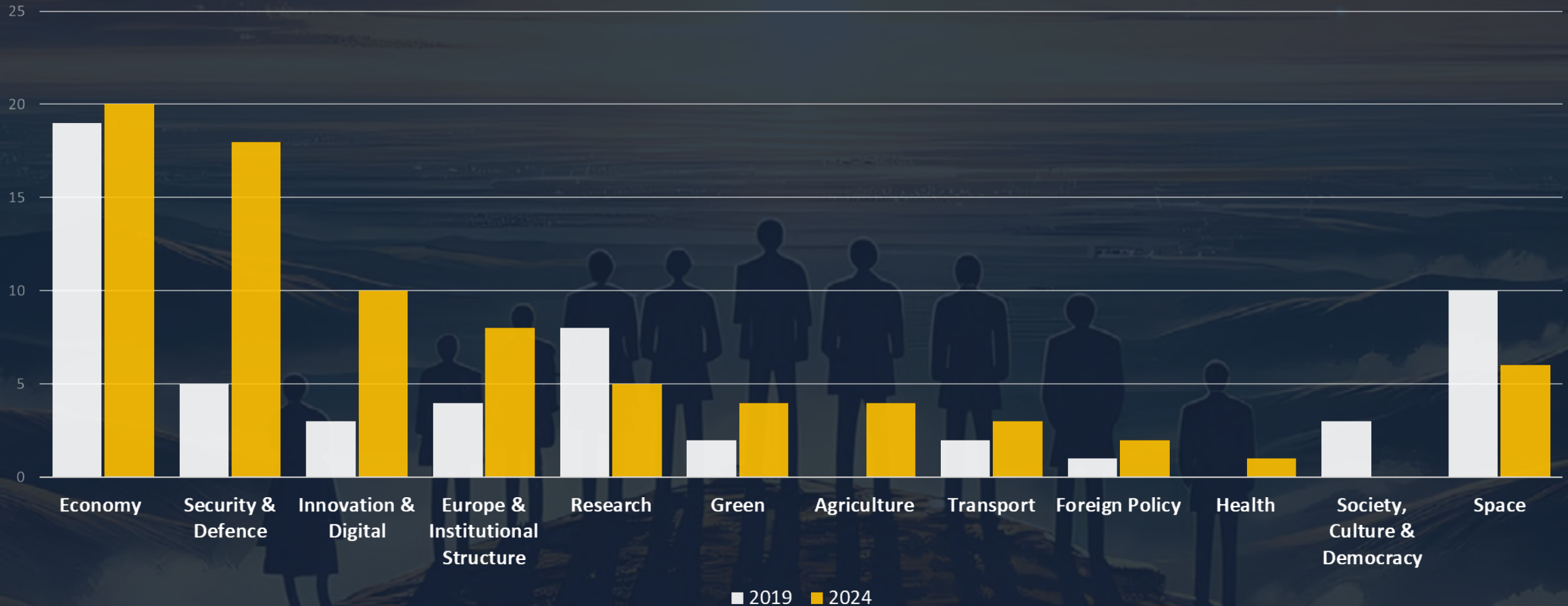
The Case of foreign, security and defence policies



Space in EU elections

Space increasingly is seen as an enabler of many policy sectors

+ 41% surge in space-related references in 2024 EU elections compared to 2019 across party manifestos.





Scale up **policy impact of space** in Europe:

- **Integrate space with policy actions** of governments and parliaments and international bodies in sectors such as **economy, diplomacy, security, and defence**
- **Design space policy in support of business strategies** of and beyond the space industry