

Europe as a 21st century space power: for a competitive, autonomous and ambitious European space policy.

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Through decades of research, investment, cooperation and industrial excellence, Europe has built a competitive, innovative and complete space ecosystem mastering every critical capability : launchers, satellites, navigation, Earth observation, connectivity, exploration, space traffic management, space safety, sustainability, resilience and space science.

Signatures : Belgium, Bulgaria, Czech Republic, Croatia, Cyprus, Denmark, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Slovakia, Slovenia, Spain, Sweden.

Today, however, the global space sector is undergoing a profound transformation. Space has become a critical infrastructure and central factor for satisfying demands in various policy fields, a platform for commercial added values and a domain of economic competition, technological leadership, security and geopolitical influence, with space capabilities increasingly underpinning critical infrastructure and essential public services.

As the Russian war of aggression against Ukraine, the rapidly evolving geopolitical context and other global events have highlighted, strategic autonomy in space, including autonomous access to space and space connectivity, is vital to European defence and collective security. As such, “strategic enablers, including in relation to space” are one of the key priority areas identified by the European Council in March 2025, as well as by the UE-ESA joint Declaration on “A long-term Vision for Space Transportation”.

At the same time, we are facing a global climate change with acute effects and that will have a lasting impact on both public health and economic development.

Faced with these challenges, Europe needs to step up its efforts to address them quickly and effectively. Europe requires higher investment, both public and private, and a regulatory environment that is flexible, transparent and facilitates private activities and commercialisation. This is to foster growth in the European market and industrial ecosystem but also to reinforce its position towards its main competitors and to support long-term competitiveness and reduce over-dependencies on non-European technologies, infrastructures, commercial operators and services in critical fields.

In order to achieve a higher level of commercialization, competitiveness, strategic autonomy and protect its interests, the European Union must fully embrace a genuine, cohesive and ambitious European space policy built around technological sovereignty, security, research and industrial capacity. Europe should also continue to seek smart and reliable partnerships and opportunities to collaborate with like-minded partners, including ESA Member States, to advance and strengthen our strategic objectives in the space domain.

The European level represents a strategic step allowing for a common framework capable of delivering globally competitive and resilient capabilities that provide clear European added value, including by leveraging and tapping into the strengths of the internal Market. It must be fostered

with cost-effective, reliable and suitable responses while fully respecting the principle of subsidiarity and Member States' roles, responsibilities and competences, especially in the context of security and defence. Europe should thus strengthen its resilience and economic security, including autonomous access to space ; strategic and secured supply chains ; critical technologies and infrastructures ; strategic data ; and health, water and food security, to decrease its dependencies exposed to single points of failure.

To achieve this objective, we must act decisively in :

Access to space is at the heart of our autonomy. EU-Member States, the Commission, ESA and its Member States, industry and space agencies must come to a common understanding, based on each actor's role to create and implement a long-term vision guaranteeing independent, reliable, sustainable, secure and competitive access to space in Europe. Based on enhanced competition in Europe as inserted by the European Launcher Challenge, a shared understanding of our common needs and an agreed overarching strategic vision, we can implement an industrial policy and coordinate actions that will foster long-term private and public investments. It will enhance the competitiveness of the access to space ecosystem, building a competitive future European launcher family, serving all payload classes and use cases and spaceports located in diverse European territories. It should be supported by predictable and aggregated European institutional demand, fair competition and open access to opportunities for established and emerging European actors.

In a context of intensifying geopolitical rivalries, Europe can no longer afford strategic vulnerabilities in connectivity, positioning, navigation and timing (PNT), Earth observation, space-based services, or launching capabilities.

As a consequence, European Member States continue investing massively in their respective space capabilities and create conditions for the private sector to invest. Complementing Member States' activities in close cooperation with ESA and based on EUSPA's operational expertise, the civil EU space programme with its existing and potential new components - Copernicus, Galileo, EGNOS, EOGS, IRIS², GOVSATCOM, SSA and access to and return from space - constitute essential pillars of European sovereignty and strategic autonomy. These civil programmes are not merely industrial or technological assets. They are also elements to build strategic infrastructures supporting Europe's economic resilience and competitiveness, crisis management, security, defence capabilities and political independence. In that regard, European and national space capabilities should be developed and operated as a coherent and interoperable system of systems. The European Union must also build and strengthen mechanisms for pooling and sharing of existing and emerging national and commercial capabilities, in order to exploit synergies, avoid unnecessary duplication and meet our collective demands with respect to national sovereignty.

IRIS² is the EU's future satellite constellation for secure connectivity and a strategic component for resilience. It will provide sovereign, secure and guaranteed services to governmental users as well as commercial applications. To that end, we continue to support the acceleration of IRIS² for the delivery of connectivity with a clear focus on expressed user needs of the Member States. This has to include commercial solutions from start-ups and other companies direct-to-device (D2D) and Internet of Things (IoT) services based on the MSS 2GHz spectrum, with the political endorsement of all Member States and the full commitment of our space industrial sector. Potential Future complementary architectural layers, should be based on a jointly agreed assessment of governmental and commercial needs, transparent and competitive implementation arrangements, without prejudice to the timely implementation of the current programme.

Given the current geopolitical environment, Europe needs timely access to Earth observation data, imagery, shorter response time, faster revisit, higher spatial resolution, and increased sovereignty over intelligence products in order to reduce our dependencies. The Union and its Member States must therefore develop an Earth Observation Governmental System as a sovereign, dual-use and user-driven component of the EU Space Programme, clearly distinct from Copernicus and under civilian and governmental control. First through a pooling and sharing system of systems to make use of existing and emerging Earth observation capabilities of the Member States and the commercial sector. Then, provided that Member States sovereign prerogatives are fully preserved, EU-owned space-based surveillance capabilities, if required, should be implemented on the basis of a gap analysis and a Council decision in support of the autonomous decision-making and action of the Union and its Member States.

The European Union must provide the framework to foster growth in Europe and the European industrial ecosystem that would improve the global competitiveness of the European space ecosystem.

This requires ensuring an enabling policy and a regulatory and financial framework, that supports greater public and private investment, the scaling of European emerging actors, and the growth of the full European industrial value chain across the entire space ecosystem, leveraging and strengthening the potential and capabilities of all Member States.

The Union must establish, as an internal market instrument, a clear, coherent, proportionate and transparent regulatory framework ensuring mission-appropriate common requirements concerning safety, resilience and sustainability of space activities, enabling an effective European single market for space, to foster competitiveness of the European entities and ensure a level playing field in the space market. This framework should ensure coherence with existing Union and national legislation and avoid disproportionate regulatory burdens for the European industry by building on internationally recognised policies, practices and standards so as not to undermine their capacity to scale up and compete globally, in particular for SMEs and start-ups.

At the same time, the EU and its Member States shall play a proactive role in promoting the core principles of international law at the cornerstone of the legal regime governing outer space activities and that serve as the essential foundation for a prosperous and resilient space sector. To that end, European values, norms and standards in space should be projected, promoting the “made in Europe” offer and attracting partners and talent from emerging space regions.

The European Union and its Member States should also stimulate demand for European space-based services through coordinated public procurement, advance market commitments and the integration of space data and services into civil protection, environmental monitoring, transport, agriculture, energy and other strategic sectors. Attention should be paid to secure data access, artificial intelligence, interoperability and the growth of European downstream companies.

Although competitive business models, investing in technological innovation and industrial excellence are essential for achieving sustainable results, space activities continue to significantly still rely on public funding and directly contribute to national security and sovereignty. Under these conditions, it is desirable that EU funded investments primarily benefit European industry, including SMEs and start-ups, based on transparent clear and objective eligibility criteria.

Europe must build and strengthen a market-driven, emerging and competitive space ecosystem across the entire space value chain with adequate measures, including through contributing to

international cooperation in space with excellent and innovative European solutions.

In this context, it is essential that a strong demand pull complements the existing technology push to adequately address capability needs, to be identified by Member States for example through building on the EU Observatory of Critical Technologies for space and defense and the Joint Task Force on European non dependence aiming at ensuring EU strategic autonomy and allowing for a close cooperation between the EU and the European Space Agency. This will reinforce the resilience of the relevant supply chains and ensure concerted synergies and complementarities with relevant industrial and R&I initiatives at European and national level. This approach should protect and provide appropriate access to intellectual property generated through public investment and address dependencies across hardware, software, data, ground systems and services.

In parallel, partnerships with industry, including SMEs and newcomers, and research organizations should also be considered with a view to strengthening the EU's industrial competitiveness. The aim should be to achieve higher impacts by co-programming R&I priorities together with relevant stakeholders, including for high TRL and through Research and Innovation Actions to ensure leveraging private investment. To sustain this ambition, Europe needs targeted efforts, including investment in talents, skills and education to foster innovation and strengthen role of universities, research centers and entrepreneurship programmes as key drivers of innovation and of the long-term resilience and attractiveness of its space ecosystem.

In emerging markets, such as In-Space Operations and Services (ISOS), the Commission, Member States and ESA must act in close cooperation to foster competitive new capabilities, prepare the space infrastructure and services such as satellite life extension, inspection, maintenance, logistics, active debris removal, and upgrade in order to answer future governmental and institutional needs and to support the competitiveness of the ecosystem in coherence with commercial perspectives. Institutional demand should be used, where appropriate, to de-risk these capabilities and support their transition towards sustainable commercial markets. At the same time, Europe is aware of the dual-use nature of many ISOS technologies, because of which any potential military application is subject to sovereign national decision-making.

The rapid evolution of the space economy coupled with fast-paced global challenges and profound geopolitical changes will only accelerate developments in the space sector. If Europe is to remain a major space power in the coming decades, it needs to be resilient, politically united and strong through economic competitiveness. Thus, a policy is needed for fair and free competition and innovations to allow a fast and sustainable growth in the European market.

Therefore, Europe must continue to reinforce the coherence, and efficiency of its space governance built on a strong EU-ESA partnership building on ESA's technical and programmatic expertise and EUSPA's key role in accordance with its mandate. This requires maintaining a clear allocation of responsibilities between the EU, ESA and its respective Member States through the creation of added value, avoiding duplication, establishing of common standards and further strengthening cooperation between all institutional players, in particular through a strong partnership between the Union and ESA. SatCen, EDA, national space agencies and other relevant actors should also contribute within clearly defined and complementary mandates, avoiding institutional duplication.

The Member States shall provide the political leadership, define strategic priorities, and mobilise the necessary instruments, for the Union space programmes and initiatives with a European added value.

ESA, building on its excellent technical expertise and programmatic experience, should continue to contribute to Europe's long-term space ambitions as trusted partner for the implementation of the

European Union space activities.

The European Union Member States, the Commission and ESA share the ambition that Europe must remain a major space power. This ambition has been supported by the ESA Ministerial Council of November 2025 and should, without pre-empting the discussion of the next EU Multiannual Financial Framework, be further sustained through the European Competitiveness Fund and Horizon Europe. It should complement and leverage on, rather than replace, national and ESA resources and should be governed transparently, fully preserving Member States' sovereign competencies and with fair access for European industrial and research actors.

Europe has the talent, the industry, the technology and the expertise to be a world-class leader in space.

<https://www.elysee.fr/emmanuel-macron/2026/09/10/europe-as-a-21s-century-space-power-for-a-competitive-autonomous-and-ambitious-european-space-policy>