EU Space Policy

EIC Accelerator Challenges WP2025

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Why do we need EU space policy?

Defence / security

Intelligence, positioning, surveillance, communication. Monitoring of critical infrastructure. Emergency and crisis management

Competitiveness

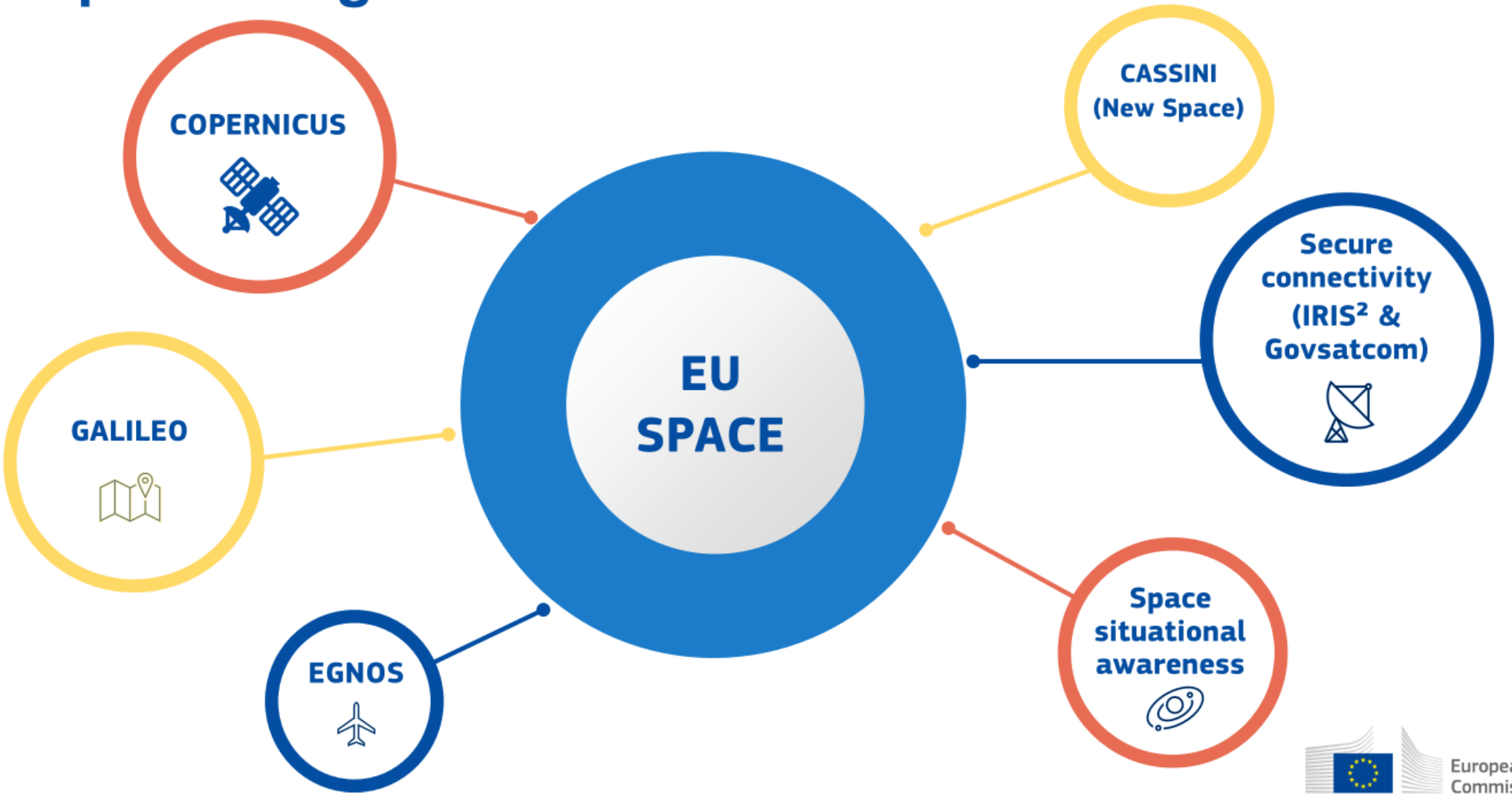
Legacy and new industry (New Space), technology push, spill-over effects (acceleration of green and digital transitions), space data uptake

Global influence

Strategic partnerships (USA, Japan, Australia, Korea, Africa), partnership with NATO & UN, EU as a standards setter, market penetration of EU space services and data

European Commission

EU Space Programme



European Commission

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Where do we stand today?

Operating EU owned assets

Satellite Navigation (Galileo)
- **32 satellites**
- 3x more precise than GPS

Earth Observation (Copernicus)
- **8 satellites**
- Largest provider of earth observation data in the world

Soon: Secure Connectivity (IRIS²)
- **300 satellites** (TBC)

Space for defence

- Space situational awareness
- New service to protect security interests of the Union
- Collaboration with Ukraine

Support innovative start-ups and SMEs (NewSpace) - CASSINI

- Access to private investment
- 600+ innovative start-ups and scale-ups 1,8 billion equities raised
- Close cooperation with EIC

Enhancing resilience

- Cyber-security
- Technological sovereignty

Regaining autonomous access to Space

- Launchers (incl new solutions)
- Launch pads & test facilities

Space research and innovation

- Evolution of EU owned assets
- Derisking, pilot missons (In space services, quantum)

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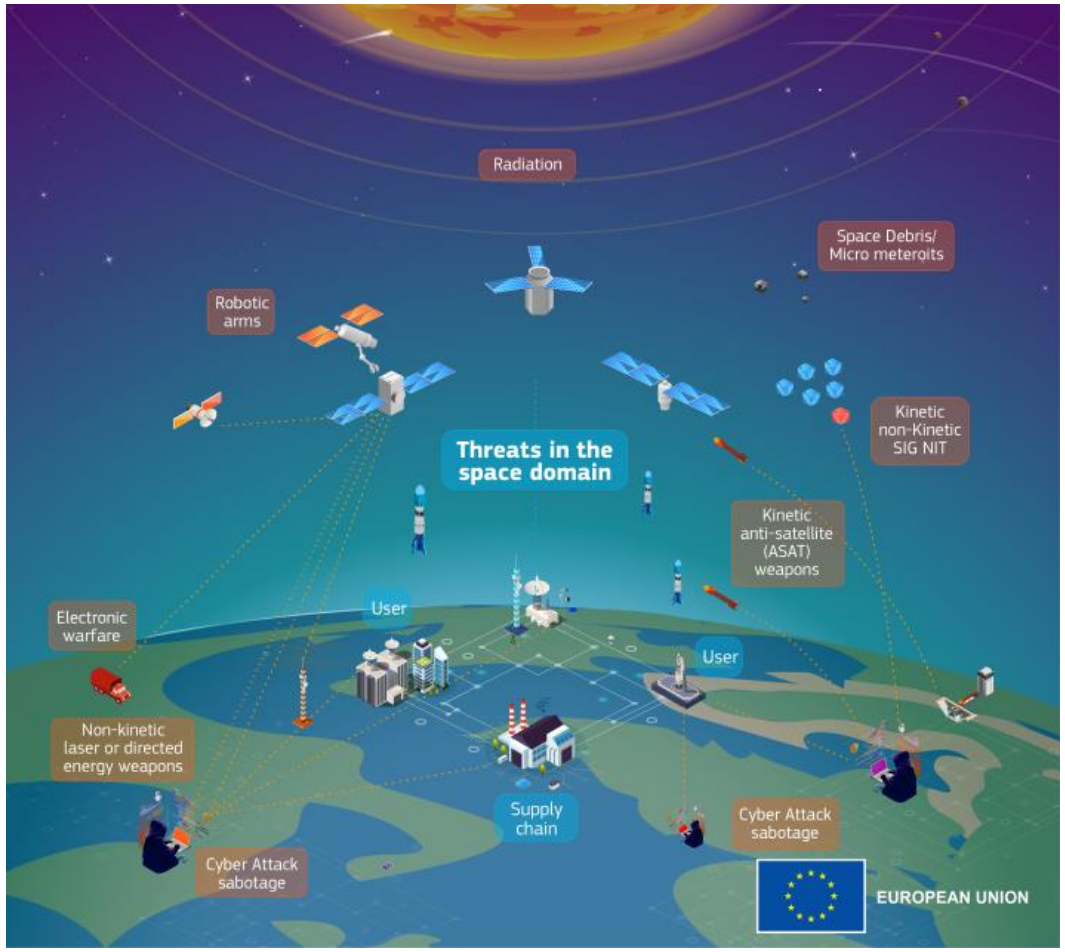
Which are the key challenges for space at EU level?



Threats to space infrastructures

- **Security threats** (cyber, jamming, laser, etc)
- Technological **dependencies** (electric propulsion, semi-conductors, etc)
- **Congested** orbits (risk of collision)

Public and private investment gaps

- Public and private **investment gap:** too little, too fragmented
- **Erosion of the competitiveness** of part of the legacy industry
- **Market barriers** : no EU single market for space, limited access to global markets.

Speed and agility

- Rapid emergence of new commercial entrants. New solutions, new technologies.

→ **Speed in the technological maturation and flight heritage**

→ **Agility in public procurement**

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Why In-Space Operations and Services?

- **Strategic capacity**

  For resilience: inspection/ damage assessment, repair and maintenance, refuelling, upgrading and reconfiguration of assets, etc).

And governmental use: protection of space

- **Key for the competitiveness:** new in-space economy, several new commercial entrants
- **Global competition:** Other space fairing nations already prepare next generation satellites for ISOS

Holistic approach - Parallel actions

1- ISOS Pilot mission

- ISOS Pilot mission to be deployed in 2030, funded by Horizon Europe. 4 components : servicing, host, logistic, satapps.
- Precursor element for a potential future strategic flagship that provides on-demand services to EU and Member States assets in space.

2- Technological maturation, development of new solutions

- Further technology and business development (including through CASSINI)
- Across different funding instruments (e.g., CL4, EIC, EDF)
- Ecosystem hub for community and event management, business and technology mapping

3- EU Space Law and Standardisation

- Forward-looking consideration of ISOS in EUSL
- Meaningful measures to support in-space economy (market generation)

4- Next Space Regulation

- Prepare the next generation of EU Space assets for in-space services

Thank you

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