Paris, July 16th 2025

Subject: Safeguarding our capability to act, thrive and secure a sustainable future: Eurospace views towards an ambitious 2025 ESA Council at Ministerial level

Dear Ministers,

The geopolitical and economic challenges of recent years and the uncertainty that defines our present, have made it clear that space is no longer just a tool for scientific progress, and just launchers and satellites – it now represents sovereignty, innovation, and economic power.

Today more than ever, the European space sector tackles some of the most pressing challenges of our times, from understanding environmental changes to making new innovative economic activities possible, and ensuring our security and defence. Institutions, armed forces, citizens and companies increasingly rely on space technology, data and services for communication, positioning systems and Earth observation, enabling the delivery of a nearly infinite range of essential services.

In November 2025, in Bremen, the European Space Agency (ESA) will present its programme proposals for subscription to its Member States during the ESA Council Meeting at Ministerial Level (ESA CM25). The European space industry, represented by Eurospace, is convinced that the renewed ambitions put forward by ESA for this ministerial conference must play a crucial role in helping Europe move beyond recent challenging times and further safeguard its ability to act, thrive, and secure a sustainable future.

1. Safeguarding our capability to act

If, three years ago in Paris, an ambitious trajectory was set by ESA and its Member States to unlock space's full potential for Europe and its citizens, today, the consensus is broader and more urgent: space is now recognised as critical for the sovereignty and freedom of action of Europe and its Member States. The contribution of space to Europe's security and resilience, once an elephant in the room, is no longer considered taboo at European level; defence budgets are on the rise and influential voices within Europe are calling for the space sector to increasingly contribute to European protection and security capabilities.

Despite this recent awareness, gaps are becoming evident with each crisis: Europe still lacks genuine autonomous orbital surveillance capabilities, high-precision navigation, positioning and timing services, as well as sufficient geospatial intelligence capacity and early warning systems to ensure operational readiness and strategic autonomy. The war in Ukraine served as a revelation: it highlighted not only Europe's reliance on satellite connectivity for military and intelligence operations, but also the critical importance of timely, all-weather geo-intelligence (such as high-revisit imaging capabilities) to support tactical decision-making and maintain freedom of action in complex operational theatres.

The new package of programmes that ESA will present in November in Bremen — particularly those supporting security and resilience, which represent a welcome and timely development — will be instrumental in this context.

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ESA's role as a space development agency should not be overlooked: it has experience in several security-related projects (e.g., Galileo Public Related Service, Security And cryptoGrAphic mission, Launcher development…) and the ESA system has proven solid and agile enough for the most demanding developments pertaining to European autonomy and security. It is, of course, traditionally not the role of the private sector to comment on the respective roles of institutions. However, the nature of space programmes requires that industry be able to interact with an experienced and technically competent customer, one capable of managing risks and long-term activities. ESA can offer that.

2. Safeguarding our capability to secure a sustainable future

ESA stands at the forefront of addressing some of the most critical issues facing humanity today, reinforcing Europe's role as a global leader in space sustainability.

Earth Observation from space is today the unfailing ally to Europe's ambitions to react as much as possible to the effects of ongoing environmental global changes. Universally recognised on the international scene, European Earth Observation systems continuously deliver an enormous quantity of data responding to the needs of a vast ensemble of users worldwide (from public administrations and scientific research groups, to private companies and citizens) who utilise European Earth Observation-satellite gathered data and services with full confidence in their quality, reliability, availability and durability.

In parallel, ESA's commitment to space safety is essential for preserving both our ability to access and use space. By developing cutting-edge technologies able to respond to natural and human-made space threats, by pioneering initiatives in planetary defence and solar weather forecasting, ESA enhances our preparedness against cosmic hazards, safeguarding vital infrastructure and scientific missions.

Finally, exploration and science remain central pillars of ESA's mission. Through collaborative programmes and ambitious projects, ESA pushes the boundaries of human knowledge, unveiling insights into the origins of life, planetary systems, and the cosmos. These scientific endeavours not only drive technological innovation, but also reaffirm the powerful role of space science and exploration as a form of soft diplomacy, fostering collaboration among nations that often face more difficult dialogues on Earth. In a context where global exploration partnerships are increasingly challenged by unilateral decisions from the United States, it is essential for ESA to maintain clear and bold ambitions for the Moon — including forward-looking programmes that aim to establish an independent European presence on the lunar surface.

By safeguarding Europe's capability to explore, monitor, and protect both Earth and space, ESA plays an indispensable role in securing a sustainable future. Ensuring that this multifaceted approach continues to receive strong support at the ESA CM25 in November will help Europe remain resilient, innovative, and prepared to meet the global challenges of today and tomorrow.

3. Safeguarding our capability to thrive

There is also an economic and industrial dimension to space with a European space industry, strong of 65,800 highly qualified workers and generating 8.8B€ of consolidate sales in 2024, contributing to the development, production and deployment of critical infrastructures for European and non-European countries.

Fifty years of ESA working hand in hand, giving birth to and largely shaping the European space industry have created a strong foundation for Europe's future in space and a key player at global scale featuring many domains of excellence. In very practical terms, 70% of industry's turnover depend on the European institutional demand; with ESA procurement alone representing more than one third (44%) of industry revenues. This means that ESA procurement policy has a very strong influence on the financial sustainability of European space industry and on its ability to invest in the future, to finance R&D or to retain talents. Industry profitability has been a concern for several years, with profit levels declining in recent years and struggling to reach even 1% at the sector level. At the same time, the size of the accessible

demand for European space systems is increasingly shrinking compared to that of other major space powers. Gaps are becoming more evident, and the need to look out for the health of the European space industry, more important than ever.

In this regard, the organisation of ESA CM25 offers a valuable opportunity to begin acting more collectively, with greater determination, and greater ambition. The European space industry is growing, diversifying, and actively preparing to absorb increased funding and workload, with the agility to adapt rapidly to institutional and commercial market demands. It is essential to keep all segments of the industry sufficiently tasked — including by providing launch opportunities and associated support to enable European independent access to space — to maintain momentum and fully realise its potential: ensuring that public authorities have unrestricted and sovereign access to the space-based infrastructure needed to implement policies and deliver essential services.

By providing a critical mass of activities, ESA programmes will be key in fostering the robustness of the European space industry and supporting its further industrialisation, scalability, and ability to deliver at pace and volume.

Space is no longer optional: it is the foundation of European resilience, competitiveness and sustainability in a world defined by crisis and transformation.

Together, we must commit to safeguarding our capability to act, thrive and secure a sustainable future. That commitment begins in November.

Yours sincerely,



Marco FUCHS
Eurospace President