

## 12<sup>th</sup> EU space policy conference

Welcome message as President of Eurospace

Dear Mr Minister Clarinval,

Dear Mr High Representative Borrel,

Dears Mr Commissioner Breton,

Dear Mr Director General Jan Wörner,

Distinguished guests,

Ladies and Gentlemen,

Let me focus my intervention on three key topics:

- What can space do for Europe?
- How is Europe doing in space?
- How can we do even better?

### I. **What can space do for Europe? What are the main priorities of Europe that can be tackled by Space?**

- First, regarding the “**Green Deal**” objectives: let us be clear, we will not be able to make Europe climate-neutral nor to protect our natural habitat if we do not have the means to autonomously assess what is happening from a global perspective. First good news, we already have Copernicus, an outstanding achievement of the EU and a unique space based public infrastructure worldwide, but this programme needs to be consolidated and expanded. Let us be even more ambitious in this domain!

- Second, Space technology and data are key to “**make Europe fit for the digital age**”, allowing for ubiquitous connectivity, secured communications, high performance navigation and providing an enormous amount of resources to data and artificial intelligence technologies. Second good news, we have in Europe a world class satellite telecommunication industry and flagships such as Galileo, and once, again this program has to be continued and upgraded!
- Third, in the field of security and defence, but also international cooperation and humanitarian aid, space is recognised as a strategic asset, if not tomorrow as THE strategic asset, by every single world power. A “**Europe stronger in the world**” does not exist without stronger capacities in space. Third good news, the European Defence Fund is a unique opportunity to improve the efficiency of public investments as well as to foster the impact of the European space industrial base on Europe defence capabilities. Practically speaking, let us also be more ambitious for SST and Govsatcom programmes!

## II. **How is Europe doing in space? Let’s look at figures**

On behalf of the European space industry, let me first start by saluting the efforts of ESA Member States for their ambitions in financing new programmes at the last Conference at ministerial level. Let me also thank the Commission and the Parliament to support an ambitious EU space programme in the next MFF.

In the “yearbook” that has been distributed during this conference, you will find plenty of key facts and figures about the situation of the European space industry. I will focus on only two important points:

- The position of Europe in space world
  - The speed of change of the space business
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- Factually, Europe is the 4th space manufacturing power worldwide and provides about 15% of worldwide spacecraft production. However, contrary to the situation of its competitors for which their institutional domestic market is the main source of revenues, most of that activity in Europe is associated to volatile and cyclical commercial export markets. So, you see that the efforts of ESA and EU that I saluted previously are not “nice to have” but are absolutely vital and especially the 16B€ of MFF.
  - But, with only 4% of the worldwide space industry workforce there is no doubt that the European space sector is an undisputed leader in at least one domain: its efficiency and its competitiveness. This should be a subject of pride for all of us.
  - This efficiency is also demonstrated commercially: this decade, European spacecraft exports rose up to almost 1B\$ per year (i.e. a 30% growth), providing a net surplus of 355 M\$ per year to the European trade balance. Last year, out of the 13 GEO satcom satellite orders on the open commercial market, Europe won 8!

- The European pace of adaptation to a changing environment
  - Not only do we observe that the US continue to invest 7 times more in space than Europe, but we also observe a reinforced strategy of space dominance: the US initiatives regarding “space traffic management” are likely to create a challenging environment for the autonomy of Europe in space, notably because of the dependency to US data this initiative will imply.
  - China has proven a high level of technological capability, together with a complete launch service array (China has become the second launch power worldwide!).
  - At the same time, some of our competitors have engaged a price war on the open market with the only objective to kill all competition.

While all this is happening around the world, in Europe, we still have to decide collectively to consider definitively space as a vital asset to preserve and support for our collective sovereignty! Doing this, we would accelerate the emergence of a much more aggressive, independent and dedicated industrial space policy for Europe.

In the past years, European industry did a lot for the journey towards “new space features” namely cost and time deliveries reduction and more innovation and agility. Let’s continue together this vital transformation.

### III. So, what can we do better together?

In line with the objectives of the Space Strategy for Europe, the priorities proposed by the space industry can be organized around 3 main pillars:

#### **Pillar 1 : Innovation and industrial policy**

- To strengthen innovation and R&D in order to improve competitiveness and non-dependence, moving towards the target of achieving unrestricted access to the state-of-the-art critical technologies at reasonably affordable economic conditions. Horizon Europe is instrumental in that respect.
  
- To devise a European-wide industrial space policy, to be implemented through innovative public procurement measures, as well as through economic diplomacy actions to support European industry to export

#### **Pillar 2 : Space iconic programs to address EU challenges**

- To fully use Space to ensure that the EU is fit for the Digital Age (Connectivity, Secure Communication); As a concrete proposal, using the 5G advent to position Europe as the champion of global telecommunication network integrating space and terrestrial solutions
  
- To make Europe a precursor of a cleaner space by developing IOS. For debris removal and desorbiting.

### **Pillar 3 : Sovereignty of Europe**

- To mainstream a “space dimension” into EU Defence Industry programs; Defence without space is now meaningless; A “Europe stronger in the world” does not exist without stronger capacities in space !
- To guarantee independent access to space, and freedom to operate in space. By organising a European approach to Space traffic management. And by securing a robust “European preference” for launchers, satellites and services to set up a real level playing field for Europeans space actors;

As a conclusion, the collective objective of all European institutional stakeholders in space should be to focus on the collective benefits that space infrastructures will bring to Europe and its citizens.

Space Industry is largely Europeanised; we will not be able to stay in the race if we do not Europeanize more the public investments!

Let Europe take the lead by inventing and investing together, industry and institutions, in an ambitious space initiative that will make Europe greener, fitter for the digital age, more secure and stronger in the world. Space is our future. Let us work together.

Thank you.