



A FIELD GUIDE ON EUROPEAN SPACE GOVERNANCE

EUROPEAN INSTITUTIONAL ACTORS,
THEIR ROLES, RESPONSIBILITIES
AND PROCESSES

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This publication reflects the ESPI's commitment to advancing the understanding of Europe's space governance landscape and fostering informed dialogue. In a domain shaped by evolving institutional dynamics, clarity remains limited despite longstanding discussions and incremental progress. Through this document, ESPI is offering a foundational resource for policymakers, industry professionals, researchers, students, and new entrants to the field. By contextualising the institutional setting and proposing orientations for the future, ESPI aims to support a more coherent and effective European approach to space governance – and ultimately to help shape – the governance models of tomorrow.

This Field Guide has been updated throughout January 2026, with specific references indicated throughout the document. Ongoing developments and policy updates continue to take place at the EU, ESA, and Member State levels. The Guide will be updated biannually, with ad hoc factsheets on specific Member States integrated in future editions. In addition, particular attention may be given to organisations such as ESO, EUMETSAT, and other relevant entities, with full acknowledgement of their respective roles.

ESPI welcomes proposals and contributions from students, young professionals, policymakers, industrial stakeholders, and the broader space community. For questions or comments, please contact office@espi.eu



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1 INTRODUCTION

The governance of Europe's space sector is anchored in what is commonly referred to as the *Governance Triangle*, comprising the European Union (EU), the European Space Agency (ESA), and individual European states (for the scope of this report, this includes ESA and EU Member States). Together, these actors define Europe's strategic orientation in space, each contributing distinct competencies and roles. **European States** have been the original drivers of space activities in Europe. Their early investments in space research, technology, and infrastructure laid the foundation for later European cooperation, first manifested through European Space Research Organisation (ESRO) and European Launcher Development Organisation (ELDO) in the 1960s. Nowadays, Member States continue to play a foundational and twofold role. On the one hand, they pursue their national space interests through domestic space agencies and associated programmes. On the other hand, they engage collectively through European structures – primarily ESA and the EU – to participate in broader, often more ambitious, joint space endeavours.

ESA, established in 1975 as an intergovernmental organisation, remains the cornerstone of Europe's space landscape. It leads the development of advanced technologies, science missions, and flagship programmes, funded through both mandatory and optional contributions from its 23 Member States. Member States can opt into optional programmes, and they benefit from ESA's principle of fair return, which ensures that national contributions are reinvested in their domestic industries through contracts. Their participation contributes to enhancing autonomy through developing European space capabilities, builds industrial capacity across the continent, and fosters industry-to-industry cooperation.

The **EU** has assumed an increasingly important role as a political, programmatic, and regulatory authority in space. It formulates strategic objectives, ambitions to set regulatory frameworks, and delivers substantial investment through the Multiannual Financial Framework – allocating over €16B for space between 2021 and 2027, including funding allocated through the main Space Programme Regulation and the Union Secure Connectivity Programme Regulation.¹ In particular, Regulation (EU) 2021/696 established the EU Space Programme, consolidating key components such as *Galileo*, *Copernicus*, *Space Situational Awareness*, and *GOVSATCOM*, while Regulation 2023/588 establishes the Union Secure Connectivity Programme for the remainder of the MFF 2021-2027 period (2023-2027). These initiatives are in some cases operationally managed by the EU Agency for the Space Programme (EUSPA), or supported in terms of the commercial uptake, user-facing applications of these systems and security accreditation. The EU's engagement

¹ In current prices. "Regulation (EU) 2021/696 establishing the Union Space Programme and EUSPA."



underscores a broader ambition: to ensure Europe’s technological sovereignty, resilience, and strategic autonomy in a rapidly evolving geopolitical context. Within the EU context, the European External Action Service (EEAS) plays a central role in defining and implementing the EU’s Common Foreign and Security Policy (CFSP) and Common Security and Defence Policy (CSDP), working closely with EU Member States and EU institutions in space affairs. In addition, the European Defence Agency plays a key role in fostering collaboration between the space and defence sectors. Under the 2021 Financial Framework Partnership Agreement (FFPA), ESA is entrusted with implementing considerable portions of the EU Space Programme, demonstrating the synergy between the EU’s political direction and ESA’s programmatic and technical competence. A **functional distinction** among these actors is implied, particularly when focusing on the mandates established in the respective funding documents.

Member States	European Union	European Space Agency
Individual states are responsible for developing and implementing national space strategies, policy, regulatory frameworks, as well as national space programmes and infrastructures; investing in research, technology, and industry at the national level; and contributing to EU and ESA flagship programmes. They also play a role in shaping European space policy through EU and ESA decision-making processes.	EU draws up a European space policy; establishes the necessary measures to implement the policies and carries out activities such as the European space programme and Horizon Europe; promoting joint initiatives; supporting research and technological development; coordinates the efforts required for the exploration and exploitation of space; and establishes appropriate relations with ESA (<i>EU TFEU</i>).	ESA elaborates and implements the long-term European space policy; elaborates and implements activities and programmes in the space field; coordinates the European space programme and national programmes and integrates the latter into the European space programme; elaborates and implements the industrial policy; and recommends a coherent industrial policy to the Member States (<i>ESA Convention</i>).

Figure 2: Overview of the functional distinction of European space actors

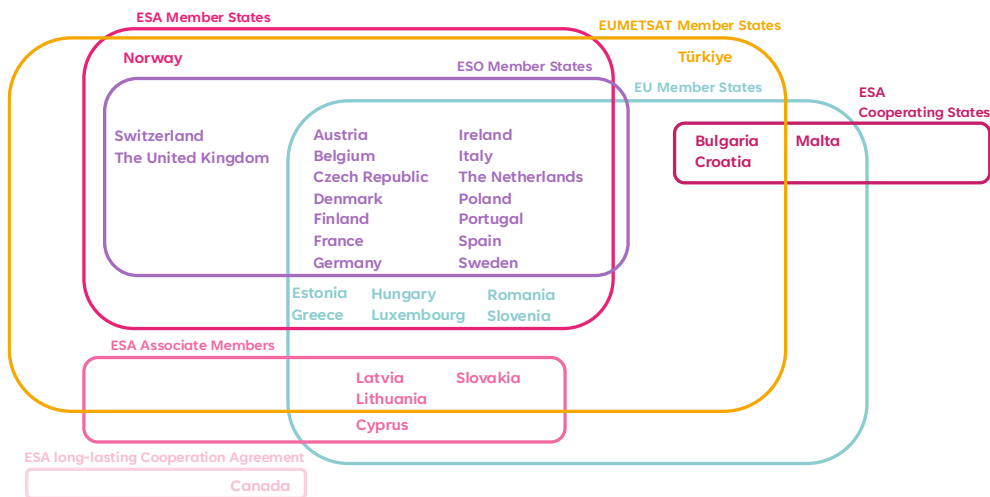


Figure 1: European space governance architecture.



The membership overlap between ESA and EU Member States reflects a high level of integration and interdependence but also creates a certain level of complexity regarding the implementation of the ESA programmes, the EU space programme, and the pooling of national capabilities.²

Beyond the EU and ESA, a range of **specialised intergovernmental institutions** and European operational agencies contribute to the broader ecosystem. These include the European Southern Observatory (ESO), and the European Organization for the Exploitation of Meteorological Satellites (EUMETSAT). **ESO** is an intergovernmental organisation for ground-based astronomy. It designs, builds and operates observatories, including the Very Large Telescope and the forthcoming Extremely Large Telescope in Chile, planned to be operational in 2030. **EUMETSAT** is an intergovernmental organisation, which operates a fleet of meteorological satellites that provide vital data for weather forecasting and climate monitoring. It delivers essential data services to European and international users and cooperates closely with ESA and with the EU, for example through Copernicus on atmospheric and marine missions and services.

Europe's current space governance model is the product of decades of institutional evolution. European States have a long-standing tradition in space activities, dating back to the early 1960s. Since ESA's creation in 1975, Europe has gradually consolidated its capabilities. The Lisbon Treaty marked a turning point, formally introducing space as an area of EU competence (shared with Member States) and accelerating the Union's policy engagement. Nonetheless, the complexity of the current governance landscape – rooted in inter-institutional cooperation and shared competencies – remains a subject of ongoing debate. Issues of roles, responsibilities, coordination efficiency, and strategic alignment persist. The following chapters provide a comprehensive overview of the governance structure of Europe's space sector in its public dimension. The first core section focuses on European Member States, examining their national approaches to space. The second and third major sections delve into ESA and EU, respectively, detailing their mandates, institutional frameworks, programmatic activities, and financial structures, as well as their international partnerships. The report then explores the interrelationship between ESA and the EU, highlighting coordination mechanisms and shared responsibilities. It concludes with a forward-looking perspective on European space governance, followed by annexes listing key stakeholders and relevant abbreviations.

² Cyprus has signed an Associate Agreement with ESA and is expected to become an Associate Member.



2 EUROPEAN STATES

European Member States have long-standing traditions in conducting space activities. Even before the foundation of ESA, several Member States were already performing their national space activities. Some notable historical examples include the Spanish development of the space technology, research and ground stations in the early 1950s; the Norwegian Andøya Rocket Range (currently Andøya Spaceport) established in 1962, which served as the launch site for the first sounding rocket dedicated to scientific research; the first Italian satellite launched in 1964; and the first French satellite Astérix launched with a Diamant rocket in 1965.³

Multiple Member States regularly release policies and strategies on which they act through either national or collective programme implementation. Over the last years, the pace of the release of such policies has increased, and their scope has diversified. Recent space policies, strategies, and laws reflect a multidomain approach, with growing attention to areas such as climate, defence, security, society, the economy, industry, and science. The following section focuses on their overview, showcasing crucial components of the European space governance.

2.1 Space governance

At the national level, governance structures vary considerably, shaped by historical, political, and administrative factors. Each State has a unique governance structure when it comes to space with various models depending on the responsible Ministries and several other bodies or entities engaged in space activities, alongside international arrangements.

Ministerial portfolios & implementation structures

The **Ministries responsible for oversight of space policy and EU-ESA Relations** cover a broad range of portfolios. Various responsibilities related to the definition and implementation of space policy fall under different ministries, ranging from economy, innovation, and science to defence, foreign affairs, or environment. Traditionally, education or science ministries have overseen civilian space activities; more recently, however, an increasing number of states have opted to cover these activities under ministries in charge of the economy, defence, industry or innovation. Recognising the transversal nature of space and its potential role for several sectoral policies, ministries in charge of transport or environment have also been selected to oversee parts of the space portfolio.

³ INTA. “History.” INTA ([Link](#)); Eivind V. Thrane. “The history of Andøya Rocket Range.” *Hist. Geo Space. Sci.*, vol.9, December 2018, pp.141–156. ([Link](#)); Michelangelo De Maria et al. *HSR-30, Italy in Space, 1946–1988*. ESA, 2003 ([Link](#)); CNES. “60 years of history.” CNES ([Link](#))



Responsibilities related to space have increasingly been assumed by Ministries of Defence, ensuring that national security and defence capabilities fully benefit from space-based assets and technologies. To strengthen military capabilities in and through space, several European countries have established dedicated space forces: France created the French Space Command in 2019, Germany established its Space Command in 2021, and the United Kingdom formed the UK Space Command in 2021. More recently, **certain Member States have added space to their ministerial titles.** This is the case of the Minister of Higher Education, Research and Space in France, or the Federal Ministry of Research, Technology and Space in Germany.⁴ In some cases, responsibility is coordinated across ministries or centralised within the Prime Minister’s office (e.g., the Inter-Ministerial Committee for Space and Aerospace Policies [COMINT] in Italy).

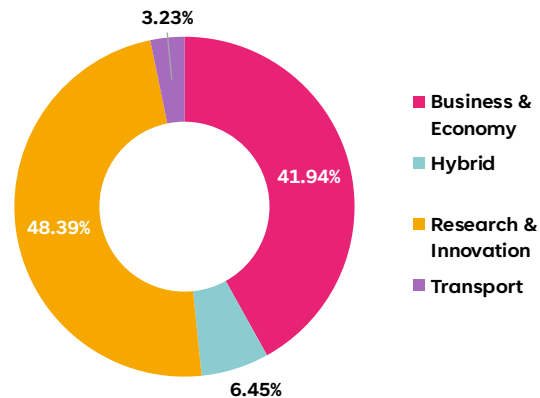


Figure 4: Ministries responsible for space policy and EU & ESA relations (Credit: ESPI database, updated Sept. 2025)



Figure 3: Types of implementing structures.

Implementing entities and mechanisms also differ. Some states rely on dedicated space agencies, others on interministerial bodies or specialised departments and committees. It is a matter of choice for individual Member States. These institutions are generally empowered with a coordinating role of national space activities and space policy including national space strategies, programme development, international representation, and budget management. The diversity of national governance reflects the subsidiarity principle but also poses coordination challenges at the European level.

⁴ Philippe Baptiste. “Official composition of the Government.” (Link), The Federal Government. “Federal Ministry of Research, Technology and Space.” (Link)



2.2 Space policy

National space policy constitutes a fundamental element of European governing space-related activities, and many Member States create policies that focus primarily on space. During the past few years, most of the Member States have revised or updated their space policy documents, with a notable rise in publications in the last five years. According to ESPI’s internal research, more than 170 national policies in EU and ESA Member States have historically mentioned different space objectives.⁵

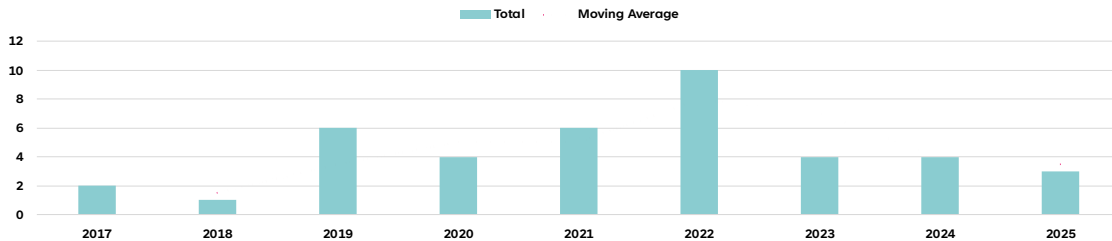


Figure 5: Publication year of space national policies (Credit: ESPI, Sept. 2025)

Several Member States also incorporate space into broader policy objectives, such as foreign policy, security, defence, cybersecurity, Research, Development and Innovation (RDI), industry, and trade policies. An interesting upward trend is noticeable in terms of the growing number of defence-focused national policies explicitly addressing space, also giving rise to a shift in defence and security oriented programmatic mandates given to ESA and ambitions proposed by the EU.

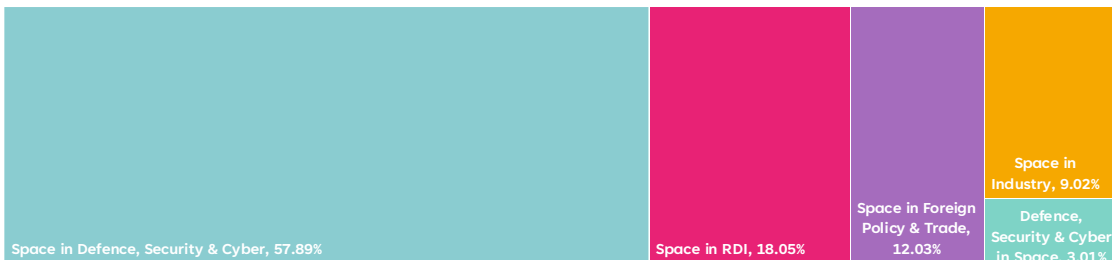


Figure 6: Strategies and policies that mention space by domain (Credit: ESPI, Sept 2025)

2.3 Space law

To date, sixteen EU or ESA Member States have established their primary national space laws, most recently including Italy, Slovakia, Cyprus, Slovenia, Luxembourg, and Portugal.⁶

⁵ E.g., the Italian “Government guidelines on space and aerospace” (2025), Finnish “Space Strategy 2030” (2025), Danish “Strategy for space research and innovation” (2024), and Dutch “Long-Term Space Agenda for the Netherlands” (2024).

⁶ See The Slovak Republic. Slovak Act No. 378/2024 (Law on the Regulation of Space Activities and on the Amendment of the Act of the National Council of the Slovak Republic No. 145/1995 Coll. on Administrative Fees). 28 November 2024 ([Link](#)); The Republic of Cyprus. Law N. 93(I)/2023 on the Authorisation of Space Activities, the Registration of Space Objects and Related Matters. April 2024 ([Link](#)); The Republic of Slovenia. Space Activities Act. 25 March 2022 ([Link](#)); Grand Duchy of Luxembourg. Law of December 15th, 2020 on space activities. 15 December 2020 ([Link](#)); Portuguese



Countries such as Czechia, Estonia, Germany, Hungary, Latvia, Malta, Poland, Romania, and Spain are notable examples of those working on the development of their national space laws.

Some of the priority areas highlighted within the analysed national space legislation involve authorisation processes, governance of the launching and landing activities, flight operations, registration of space objects, satellite operations and usage of the satellite-retrieved data, and responsibility and liability frameworks.

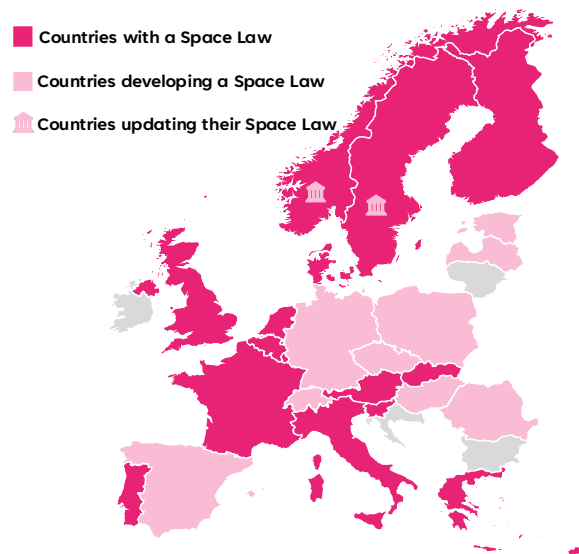


Figure 7: Status of space law across European countries (Credit: ESPI, Sept. 2025)

2.4 Programmes

National space programmes are implemented either via national space agencies and space offices, or via ESA acting on behalf of Member States. Some of these programmes align with programmatic priority areas of ESA and the EU, but many others are motivated by other national priorities, such as regional development goals, security interests, national ambitions in science and technology, and bilateral cooperation with third countries. As an example, the French military satellite communication system, Syracuse, ensures communications in support of armed forces operations.⁷ Similarly Italy's COSMO-SkyMed programme is jointly financed by the Italian Space Agency and the Ministry of Defence and deploys a constellation of SAR satellites that can acquire high-resolution imagery around the clock and under all weather conditions.

In parallel, bilateral cooperation within EU and ESA Member States, as well as with third countries also occurs. The Treaty of Aachen between France and Germany, the Quirinal Treaty, between Italy and France are examples of European states bilaterally accelerating politically sensitive capabilities. Similarly, an example with third countries is the Operation Olympic Defender (MNF-OOD), which provides an operational multinational format for coordinated space operations with four non-European countries and includes France and Germany.

Republic. Decree-Law N.o 16/2019 establishing the Regime for Access and Exercise of Space Activities in Portugal. 22 January 2019 ([Link](#)); Portuguese Republic. Decree-Law No. 20/2024. 2 February 2024 ([Link](#))

⁷ See DLR. "DLR Ground Station Network." DLR ([Link](#)); ASI. "SARDINIA DEEP SPACE ANTENNA – SDSA." ASI ([Link](#)); The French Space Command. "Space capabilities." The Ministry of the Armed Forces ([Link](#)); GOV.UK. "National Space Operations Centre." GOV.UK ([Link](#)); SSC Space. "Espace Space Center - The world's most versatile space center." SSC Space ([Link](#));



Development of national capabilities through ESA

Some Member States use the Article 9.2 of the ESA Convention to further develop their national capabilities. Article 9.2 states that “*if, outside the activities and programmes referred to in Article V but within the purpose of the Agency, one or more Member States wish to engage in a project, the Council may decide by a two-thirds majority of all Member States to make available the assistance of the Agency*”.⁸ This provision enables any Member State, individually or jointly, to request ESA’s assistance for national programmes, making it possible to benefit from the Agency’s expertise. Italy is an example of a Member State that selected ESA to develop its national project — IRIDE.⁹ The IRIDE constellation represents the new generation of optical multispectral satellites, designed and integrated by Italian industry, with ESA managing the constellation’s creation, ground facilities and services. After becoming fully operational by June 2026, the system will be transferred to the Italian Space Agency (ASI), showcasing a significant achievement in European space collaboration between the Member States and ESA.¹⁰

By participating in ESA’s mandatory and optional space programmes and closely interlinking their national capabilities with the EU space programme, States can also contribute to enhancing their national and overall intra-European space capabilities.

2.5 European public space expenditure

Space budgets in Europe are intertwined with a variety of budget transfers (delegations, contributions) between different national, intergovernmental, and supranational actors. ESPI estimates the European space budget, understood here as the sum of ESA and EU Member States budgets (excluding Canada), was around €15.4B in 2024. This includes two main sources of public funding:

- National space budgets, which are the primary source of public funding in Europe.
- The EU space budget, which is financed through Member States’ contributions to the budget of the Union but managed as a supranational budget complementing national budgets. In 2024, the EU space budget represented an additional public investment of €2.75B.¹¹

⁸ ESA, Convention for the Establishment of a European Space Agency (ESA/1297 UNTS 161). ESA, 30 May 1975 ([Link](#))

⁹ Telespazio. “IRIDE.” ([Link](#))

¹⁰ Josef Aschbacher. “IRIDE: A satellite with a unique background.” LinkedIn, 2 April 2025 ([Link](#))

¹¹ Figure 8: * National Space Budgets include all budgets of EU and ESA member states excluding Canada; ** According to the EU Financial Transparency System data; *** ESA budget includes €367 million from other sources including the contribution from Canada; **** EUMETSAT budget includes around €100 million from other sources including the contribution from Turkey.

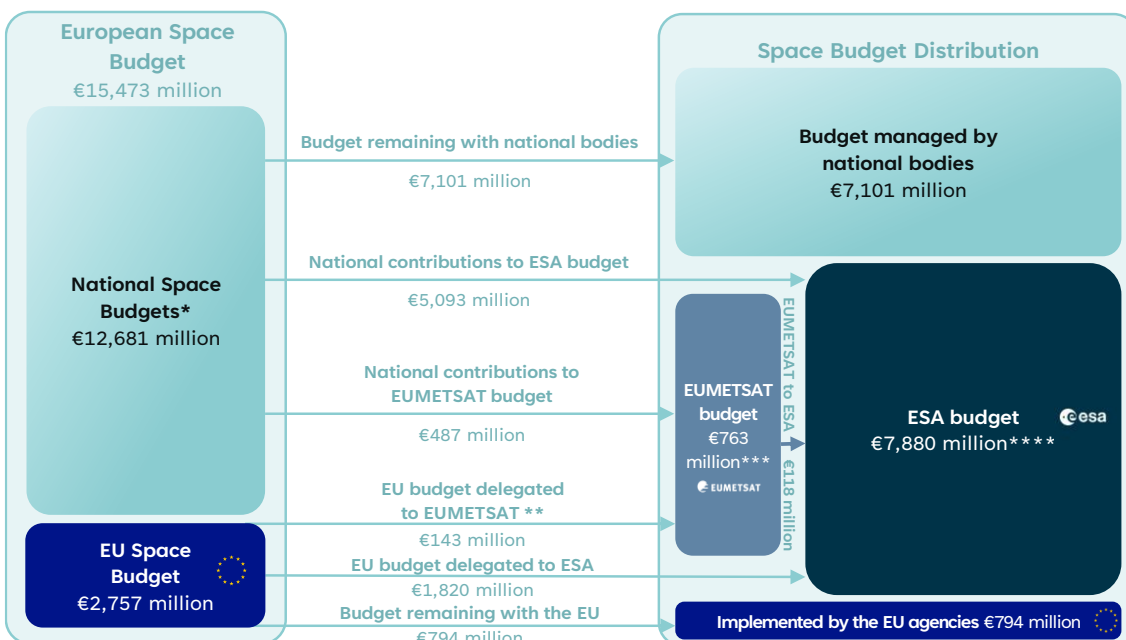


Figure 8: Consolidated European space budget 2024 (ESPI, 2025)

In terms of spending on space per country/entity, in 2024, France had the largest budget, accounting for around 24% of the total European space budget. The EU spent the second largest sum at €2.7B, representing around 18% of the European total. In third came Germany, with an estimated institutional spending of €2.5B, accounting for 16% of the total. Other European countries with significant space budgets are Italy (€2.4B, 16% of total), the United Kingdom (€1.3B, 8.7%), and Spain (€715M, 4.6%).¹² On average, around 49% of national space budgets are allocated to ESA, with EUMETSAT and ESO accounting for another 8% and 4%, respectively.

Early calculations for 2025 show the EU spending roughly €2.8B, and around €12.1B spent by European ESA Member States. Country-wise, France once again had the largest budget (a bit over €3B, 21% of European total), followed by Italy (€2.8B, 19%) and Germany (€2.2B 15%). The UK and Spain closed the top five, spending around €1B (7%) and €600M (4%), respectively.¹³ On average, around 52% of national space budgets were allocated to ESA.

This breakdown will significantly change in the upcoming years, considering rising commitments to using space for security and defence. As of the date of this publication, the biggest change is expected to come from Germany, which in 2025 pledged to invest an additional €35B into space defence over the next five years.¹⁴ Some other countries have

¹² ESPI estimates based on Novaspaces, “Defence Spending Drives Government Space Budgets to Historic High”, 2025 (Link)

¹³ Novaspaces, “Global Space Spending Reaches \$137B, Marking a Defense-Led Era” Novaspaces, 20 Jan. 2026, (Linkj),

¹⁴ Tereza Pultafova, “What Germany’s \$41B investment in space could mean for Europe”, SpaceNews, 1 Oct. 2025, (Link)



also already significantly increased their space spending, such as Poland, which went from €190M (1% of European total) in 2024 to around €336M (2%) in 2025.

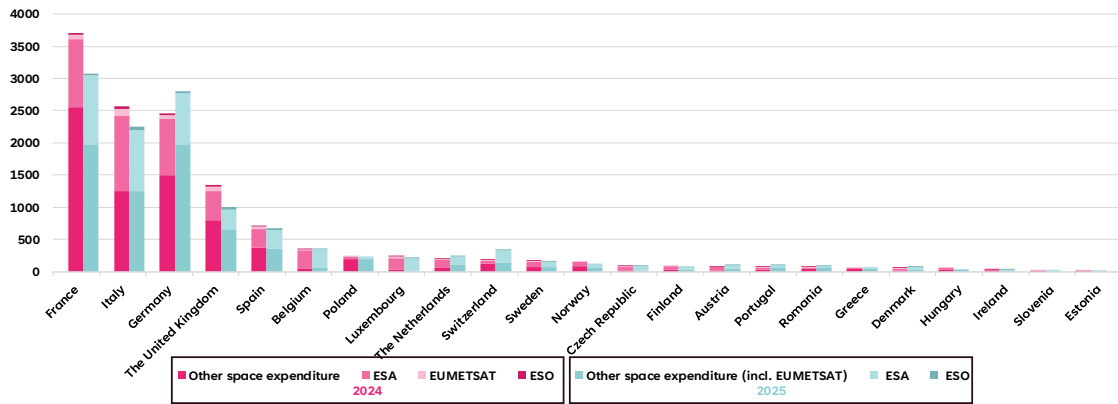


Figure 9: ESA, EUMETSAT and ESO Contributions within the national space expenditure, nominal, 2024 and 2025 (M€). Due to data collection limitations, only countries spending >€10M/year on space are included. (Source: Novaspace, ESA, EUMETSAT, ESO)

Even though France and Germany are the two Member States with the highest nominal space expenditure, when space spending is viewed as a percentage of the country's GDP, a different picture emerges. Luxembourg spends almost 0.3% of its GDP on space, the highest percentage in Europe, followed by France at 0.12% and Italy at 0.11%. Denmark and Ireland's space budgets represented the lowest share in the national expenditures, at 0.015% and 0.006%, respectively. On average, space spending in European countries in 2024 comprised 0.05% of GDP.

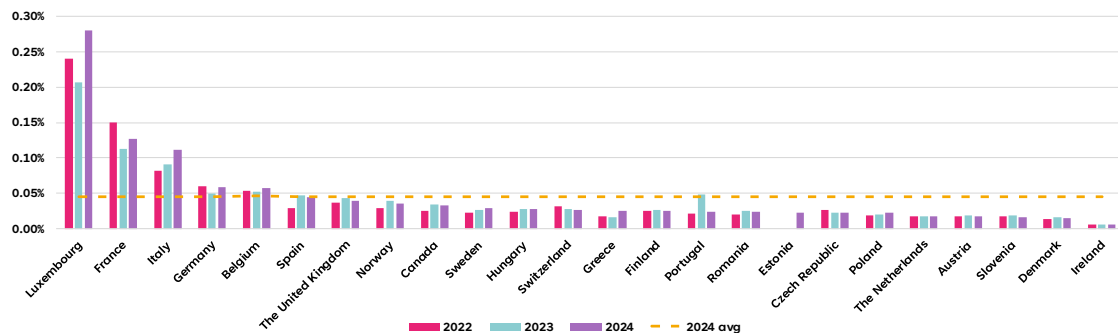


Figure 10: % of GDP dedicated to space among ESA Member States (2022-2024)



Recovery and Resilience Facility

In recent years, many national space ecosystems have been enhanced by the use of EU funding for their national recovery and resilience plans – thanks to the combined amount of €723B in loans and grants available through the EU’s temporary Recovery and Resilience Facility (RRF). A response to the COVID-19 pandemic, the RRF entered into force in 2021 and gives Member States until the end of 2026 to implement their recovery and resilience plans.¹⁵ The funding was initially made available for civilian objectives aligning with EU’s goals in spheres like the green transition and digital transformation, but in June 2025 the Facility’s scope was widened to include defence projects.¹⁶ Many Member States have used RRF funds to invest in space infrastructure and programmes that would have otherwise been inaccessible due to limited budgets, especially in view of the end of the general escape clause of the Stability and Growth Pact in 2023, which had suspended the EU rules and limits on Member States’ deficits and debt. By 2022, of the 26 Member States that had submitted their RRF plans, just under half made explicit mention of action related to space.¹⁷ For example, Italy has allocated around €1.5B from the RRF to space, and Spain has committed €1.1B to the aerospace sector under its Strategic Projects for Economic Recovery and Transformation (PERTE) programme, including towards key European assets like launchers. Poland also pledged to allocate an estimated €150M of its RRF funds towards national satellite information and Earth Observation systems, while Portugal has distributed some of its RRF funds to specific national space industry actors.¹⁸ **Though RRF has been widely utilised for space projects, the Facility’s sharp deadline puts several constraints on Member States.** Not only does the RRF formally end in 2026, but all its funds also need to be deployed by that date.¹⁹ If the funding is not fully used by the end of 2026, the Member State will lose access to those EU funds even if the projects those funds were used for are not yet finished. For countries with lower budgets or higher levels of debt, the potential end of RRF funding without renewal could affect their ability to maintain their public investment levels across various sectors, including space.

¹⁵ European Commission, “RRF Timeline,” (Link)

¹⁶ Giovanna Faggionato, “EU frees up billions in Covid cash for defense spending”, POLITICO, 4 June 2025, (Link)

¹⁷ V. Bacco & T. Walker. 2022. “Investing in Space: EU bets on the final frontier.” *Logos* (Link)

¹⁸ Ministry of Funding & Regional Policy. 2022. “National Plan Reconstruction & Resilience.” GOV PL (Link); European Commission. N.d. “100 largest final recipients – Portugal.” European Commission (Link)

¹⁹ Per the RRF regulation, all milestones and targets for projects must be completed by 31 August 2026, with the final RRF funds disbursed by 31 December 2026. “REGULATION (EU) 2021/241 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 12 February 2021 establishing the Recovery and Resilience Facility”, 12 February 2021, (Link)



2.6 International cooperation

International cooperation in space can take different forms depending on its objectives, ranging from collaboration between individual countries (bilateral, between European countries and with third countries) to broader partnerships at the regional or international level (multilateral).

The primary stakeholders responsible for conducting bilateral and multilateral relations have traditionally been the respective Ministries of Foreign Affairs and national space agencies. It can unfold in a **top-down process** (request by the Ministry, then addressed by the space agency) or in a **bottom-up process** (directly initiated by the agency under its own name, or in coordination with the Ministry) depending on the nature of the agreement. Space agencies tend to have broad autonomy to develop an international cooperation strategy and engage in bilateral cooperation. Member States can formalise their cooperation at the bilateral or regional level through various mechanisms, including the pooling of institutional or financial resources in joint programmes, the signing of cooperative agreements for shared activities, or the issuance of joint declarations and statements.²⁰ Long-lasting and deepened cooperation can also be formalised through intergovernmental agreements, or with soft law instruments such as the Artemis Accords.

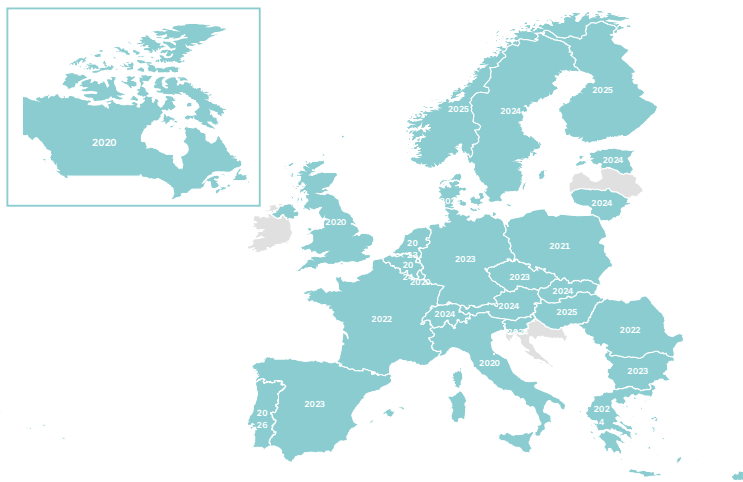


Figure 11: Map of the Artemis Accords signatories from ESA states (Credit: ESPI database, updated Jan. 2026)

Outside its involvement in EU and ESA-led programmes and initiatives, Member States have developed extensive bilateral collaborations with several countries, both within Europe and third countries, including all other major spacefaring nations. Furthermore, they are fostering new partnerships with emerging spacefaring countries. This form of

²⁰ Secure World Foundation, Handbook for New Actors in Space. 2nd edition, 2024.



international collaboration is beneficial for burden-sharing and the continued access and reinforcement of space capabilities of Member States.

Likewise, the political dimension of international cooperation among the Member States plays a vital role and cannot be overlooked. Such agreements often encompass cooperation considering scientific exploration in space, technological exchange and the formulation of political strategies. In terms of defence cooperation in space over the past decades, Member States have been mainly focused on the exchange of capabilities with North Atlantic Treaty Organization (NATO) partners.



3 EUROPEAN SPACE AGENCY

ESA is an intergovernmental organisation established in 1975, as a result of a “merger” between two previously existing organisations, ESRO and ELDO. Starting off with 12 participants at the 1975 plenipotentiary conference in Paris (of which 10 initially signed the Convention), ESA has seen the number of its Member States grow to its current level, with the Agency comprising 23 Member States, and 4 Associate Members.²¹ Estonia and Hungary acquired this status in 2015.

Slovenia became an Associate Member in 2016 and ESA’s latest full member in January 2025. Latvia became an Associate Member in 2020, Lithuania in 2021, and Slovakia in 2022. Four other EU Member States (Bulgaria, Malta, Cyprus, and Croatia) have signed the European Cooperation Agreement with ESA, allowing these countries to cooperate in a tailored set of ESA activities and builds up the countries’ capacity.²² Cyprus has signed an Associate Agreement with ESA and is expected to become an Associate Member in the coming months.²³

Canada and ESA have a long-standing cooperation agreement, last renewed in 2019 and in effect until 2030.²⁴ In addition, in 2025, the Australian Government announced a mandate to initiate negotiations on a Cooperative Agreement.²⁵ Also in 2025, ESA and the Korea Aerospace Administration (KASA) started a new chapter of their collaboration, signing a MoU on the enhanced cooperation.²⁶



Figure 12: ESA membership overview (updated to October 2025)

²¹ ESA, Convention for the Establishment of a European Space Agency (ESA/1297 UNTS 161). ESA, 30 May 1975 ([Link](#)); ESA’s current 23 Member States are Austria, Belgium, the Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Luxembourg, the Netherlands, Norway, Poland, Portugal, Romania, Slovenia, Spain, Sweden, Switzerland and the United Kingdom.

²² ESA. “Member States & Cooperating States.” ESA ([Link](#))

²³ ESA. “Cyprus joins European Space Agency as an Associate Member.” ESA ([Link](#))

²⁴ Government of Canada. “Canada-European Space Agency Cooperation Agreement.” CSA ([Link](#))

²⁵ Ministers for the Department of Industry, Science and Resources. “International partnerships back Australia’s space industry.” ([Link](#))

²⁶ ESA. “N° 56–2025: ESA and Korea AeroSpace Administration embark on new cooperation.” ESA ([Link](#))



3.1 ESA mandate in space

Under the **ESA Convention**, the purpose of ESA is “to **provide for and to promote, for exclusively peaceful purposes, cooperation among European States in space research and technology and their space applications**, with a view to their being used for scientific purposes and for operational space applications systems by:²⁷



Figure 13: Summary of ESA's core mandate

A historical perspective on ESA establishment

Following the events of the Second World War, and the major developments from space powers such as the United States and the Soviet Union, Pierre Auger and Edoardo Amaldi urged European governments to create a CERN-style body dedicated entirely to space science in 1958. In the early 1960s, scientists from ten European nations formed the ‘Groupe d'etudes Europeen pour la Collaboration dans le domaine des recherches spatiales’ to explore intergovernmental space collaboration, which later evolved into setting up the ‘Commission préparatoire européenne de recherches spatiales’ (COPERS). Several European countries, including Belgium, France, Germany, Italy, the Netherlands, and the United Kingdom created two different agencies, the ELDO, to develop a launch system; and ESRO, focused on developing spacecraft primarily for scientific purposes, and later included space applications as an optional programme. In 1964, the Conventions for the ELDO and ESRO agencies came into force. Several of today's ESA sites (ESTEC, ESOC, ESRIN, ESRANGE) were all established in this early period. In the early 1970s, with ESRO strengthening its scientific role while ELDO was hindered by technical, financial, and political difficulties—and ultimately dissolved—discussions began on creating a unified

²⁷ Article II of the ESA Convention



European space organisation.²⁸ At the end of the Conference of Plenipotentiaries in 1975, the Convention for the establishment of ESA was opened for signature by the Member States of the European Space Conference until 31 December 1975.²⁹ The Convention entered into force in 1980.

In addition, the Convention gives ESA the mandate to:³⁰

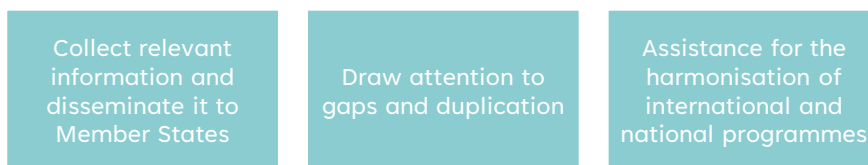


Figure 14: ESA's additional responsibilities

At the policy level, ESA plays a role in implementing and supporting the shaping of space policy for its Member States and Europe as a whole, helping to align the space-related goals of European nations. **ESA's main role is enabling a comprehensive European space programme by coordinating the financial and intellectual resources of Member States, thus undertaking programmes that would otherwise be beyond the scope of a single Member State.** It is the responsibility of Member States and ESA to promote the exchange of scientific and technical knowledge. In this sense, ESA serves not only as a space agency in the traditional sense but also as a facilitator and integrator of national space initiatives.

In terms of international cooperation, the rules are set out by the Convention, which stipulates that ESA can **cooperate with other international organisations and institutions, as well as with Governments, organisations and institutions of non-member States, and to conclude agreements** with them.³¹

ESA's operations are conducted for "exclusively peaceful purposes," a phrase directly tied to international space law. The legal interpretation of this phrase is to be guided by public international law, taking into account documents such as the United Nations (UN) Charter, the Outer Space Treaty, and customary international law.

ESA increasing role in security and defence

The current geopolitical challenges have significantly influenced Europe's efforts to strengthen its internal security and defence capabilities. Reflecting these evolving priorities, ESA has progressively aligned its mission to address emerging national and

²⁸ ESA. "History of Europe in space." ESA (Link)

²⁹ ESA, Convention for the Establishment of a European Space Agency (ESA/1297 UNTS 161). ESA, 30 May 1975 (Link)

³⁰ ESA Convention, Article V a. iii.

³¹ ESA Convention, Article XIV. It is subject to decisions of the Council taken by unanimous votes of all Member States.



regional security needs.³² In response to the growing importance of space in the security and defence landscape, ESA Member States have begun to more explicitly redefine the Agency's role within this domain. Increasingly, the Agency is engaging in activities directly related to security and defence, supporting Europe's broader goal of safeguarding peace both within its borders and in its neighbourhood. This strategic shift is evident in recent ESA initiatives, including the development of programmes that respond to military and dual-use needs, as well as the growing financial contributions from national ministries of defence.³³ The ESA Ministerial Council in November 2025 in Bremen was an opportunity to advance European space efforts related to security and defence, especially with the establishment of the European Resilience from Space (ERS) programme.³⁴ A clear mandate for the use of space applications for non-aggressive defence purposes signifies an historic change for ESA. Recital 11 of the Resolution provided that: *'ESA's intergovernmental framework provides the credentials and tools for developing space technologies and systems including for security and defence—and to implement corresponding activities and programmes on behalf of its Member and Participating States as well as for the EU in compliance with the peaceful use of outer space and the Convention'*.³⁵

3.2 ESA internal governance and decision-making process

ESA inherited the governance and decision-making structure of one of its predecessors—ESRO—centered on an overarching Council and subordinate bodies: a framework that is reflected in the ESA Convention, which defines the **organs of the Agency as the Council and the Director General, assisted by a staff**.³⁶ With the development of ESA's activities, several additional ancillary bodies of the Council were established in the decades following its creation. Indeed, the Convention stipulates that the **Council may establish subordinate bodies as deemed necessary for carrying out the responsibilities of the Agency and the development of its activities**. The only exception to this rule is the Science Programme Committee (SPC), the creation of which is already pre-determined by the Convention. In practice, different areas of competence within ESA are organised in Directorates, each headed by a Director, however the Convention makes no explicit reference to this role.

³² ESA was already involved in a wide range of initiatives, including high-profile projects such as the Galileo Public Regulated Service (PRS).

³³ Andrew Parsonson. "Exploration and Space Transportation See Largest ESA Funding Boosts." *European Spaceflight*, 26 November 2025 (Link)

³⁴ ESA. "ESA Member States commit to largest contributions at Ministerial." *European Space Agency*, 2025 (Link)

³⁵ European Space Agency (ESA), Resolution on Elevating the Future of Europe through Space (ESA/C-M/CCCXLI/RES.1(Final)). ESA, 27 November 2025 (Link)

³⁶ ESA Convention, Article X



3.2.1 The ESA Council

The **Council** is ESA's governing body and is composed of representatives of Member States of the Agency. It is considered ESA's “supreme organ, legislative and decision-maker providing the basic policy guidelines within which ESA develops the European space programme.”³⁷

The **Director General is the Secretary of the Council**; they may designate a member of the staff of the Agency to exercise this function in their stead. The Council is steered by an **elected Chair and Vice-Chair** with 2-year mandates (with the option for their mandate to be extended for a third year).

The Council meets in different compositions, at both the delegate level and the ministerial level. Under the Convention, its decision-making competence is independent of its composition; regardless of the level, the Council exercises the same powers. However, in practice, influential programmatic decisions are generally taken at the ministerial level.

ESA Council meetings at ministerial level

ESA Council meetings at the ministerial level are composed of ministers competent for space in ESA Member States and are convened every two to three years, with the latter being the regular frequency in practice. They define the policy priorities to be followed in pursuit of ESA's purpose—and the programmes that are to be pursued in the coming years—by deciding on the amount of resources to make available to the Agency and to each individual programme. They are also responsible for tabling programme proposals and budgetary subscriptions of Member States, and agreeing to start new programmes or eventually terminate those considered obsolete.

CM12	20–21 November 2012, Naples, Italy
CM14	2 December 2014, Luxembourg
CM16	1 and 2 December 2016, Lucerne, Switzerland
CM19	27–28 November 2029, ESA’s Council at Ministerial Level, Space19+, Seville, Spain
CM22	22–23 November, Paris, France
CM25	26–27 November 2025, Bremen, Germany

When the Council meets at ministerial level, it shall elect a Chair (or two Vice-Chairs, in recent years) for the duration of the meeting. The **ESA ministerial council Chair** is usually the Minister of the country responsible for hosting the ministerial council meeting (with exceptions occurring in the past), supported by the **ESA DG and Chair of Council at the**

³⁷ Gabriel Lafferranderie, “European Space Agency (ESA)” in Jan Wouters, ed, *IEL Intergovernmental Organizations* (2004).



Delegate level.³⁸ The **draft agenda shall be drawn up by the Director General**, after consultation with the Chair of the Council and with the minister who chaired the previous ministerial meeting.

In addition to ESA council at the ministerial level, an ***ad hoc* Intermediate Ministerial Meeting (IMM)** can be organised to tackle specific topics/issues. In this context, the role of Chair of the IMM is usually played by the Chair of the previous meeting of the ESA council at the ministerial level. A recent example is the Intermediate Ministerial Meeting (IMM) organised in Matosinhos, Portugal, on 19 November 2021. In recent years, several space summits have been organised, such as, for instance, the European Space in Summit, Seville, Spain on 6 November 2023.

ESA council meetings
at delegated level

The ESA council meetings at delegate level are held several times a year when required (at least twice a year, but generally 4 times) and are attended by delegates that are nominated by the governments of ESA Member States, usually the staff of ministries or implementing entities responsible for space such as national space agencies.

During council meetings (irrespective of their composition), each Member State has one vote, and it is represented by a formal delegation composed of a maximum of two representatives. However, a Member State shall only have the right to vote on matters related to those ESA programmes in which it takes part, in addition to the general corporate and administrative affairs.³⁹ Per the ESA Convention, *except where this Convention provides otherwise, decisions of the Council shall be taken by a simple majority of Member States represented and voting. In determining the unanimity or majorities provided for in this Convention, account shall not be taken of a Member State which has no vote.*⁴⁰

The Council may, by unanimous decision, **grant observer status to the governments of non-member States and to international organisations**. At the ministerial level, observer participation is decided on an ad hoc basis, whereas at the delegated level observers may be admitted on a permanent basis. The EU is a permanent observer at the delegated level. The observer status includes the right to be represented in meetings of the Council.⁴¹ International organisations, institutions of Member and non-member States, as well as individual experts may, with the agreement of all delegations, be invited to be represented in a meeting of the Council or in discussions on individual items on the agenda of a Council meeting.

³⁸ ESA Council Rules of Procedure, Rule 10

³⁹ See https://www.esa.int/About_Us/Law_at_ESA/ESA_s_organisations_and_functioning and https://www.esa.int/About_Us/Corporate_news/Convention-Rules

⁴⁰ ESA, Convention for the Establishment of a European Space Agency (ESA/1297 UNTS 161). ESA, 30 May 1975 ([Link](#))

⁴¹ ESA Council Rules of Procedure, Rule 23



The Council decide[s] on the **admission of new Member States** and decide[s] on the arrangements to be made in the event of a Member State’s denouncing this Convention or ceasing to be a member. With regards to relevant information to be disseminated to Member States, the Council adopt[s], by a two-thirds majority of all Member States, recommendations addressed to Member States.⁴² Further methods for the Council to carry out its responsibilities are set out in the ESA council rules of procedure.

Additionally, the Council has the power to define the policy to be followed by the Agency in pursuit of its purpose; modify the mandate of ESA, as well as decide upon aspects related to its industrial policy; and adopt recommendations addressed to Member States.⁴³

3.2.2 Director General & Directors

Director General

As the Agency’s chief executive, the Director General is responsible for the management of the Agency, the execution of its programmes and the implementation of the directives and policy orientations received by the Council. They may also submit proposals concerning activities and programmes as well as measures designed to ensure the fulfilment of the Agency’s purpose. The Director General is supported by scientific, technical, administrative and

clerical staff.

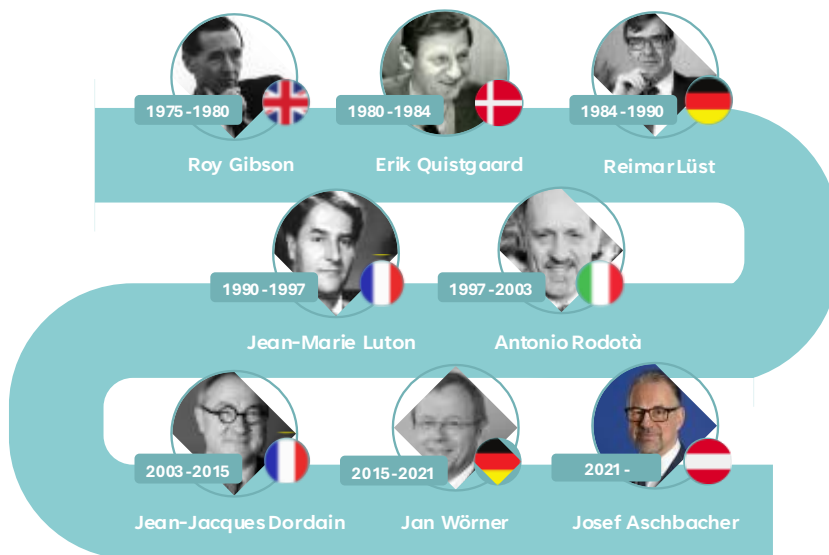


Figure 15 ESA DGs throughout the years

Directors & Directorates

The Convention stipulates that “senior management, as defined by the Council shall be appointed and may be dismissed by the Council on the recommendation of the Director General.” This vote requires a two-third majority. Throughout the decades the names, responsibilities and overall number of Directorates have changed. The

⁴² Activities referred to in Article V, 1 a (iii) and (iv):

⁴³ ESA Convention, Article X



Directorates are structured across departments, divisions, sections, and offices and can also be supported by advisors. The Director General is currently supported by 11 Directors, each of whom is either responsible for one of ESA's programmes or for administering a part of the Agency.⁴⁴

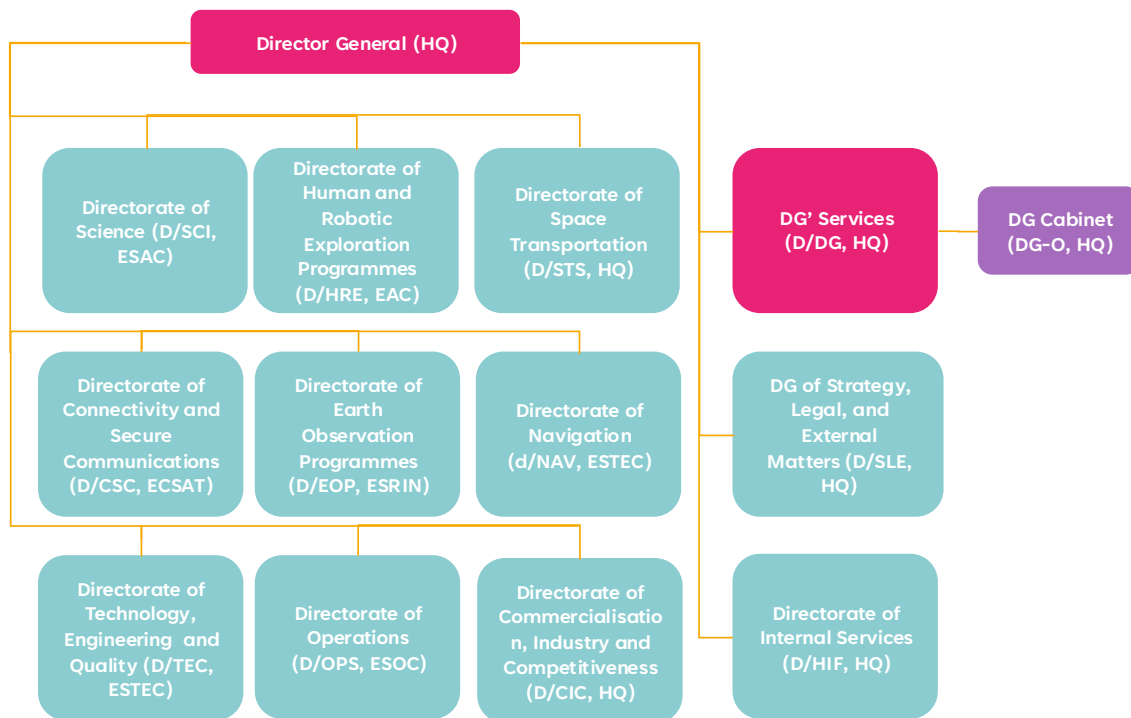


Figure 16: ESA Directorates

The Executive Board (EB) is the top-level management body responsible for the implementation of ESA's policies, programmes, and strategic decisions, under the authority of the ESA DG. It is chaired by the **Director General (DG)** and is composed of the **Directors of the main ESA Directorates**. The ESA DG's Services provide the organisational backbone for the agency's executive operations. At the top, the Basic Activities Office oversees essential administrative functions. In this context, the DG Cabinet further supports strategic and operational coordination, with divisions dedicated to Council relations, language services and minute-writing, and senior security coordination.

⁴⁴ European Space Agency. "ESA top management." ESA, n.d., (Link)

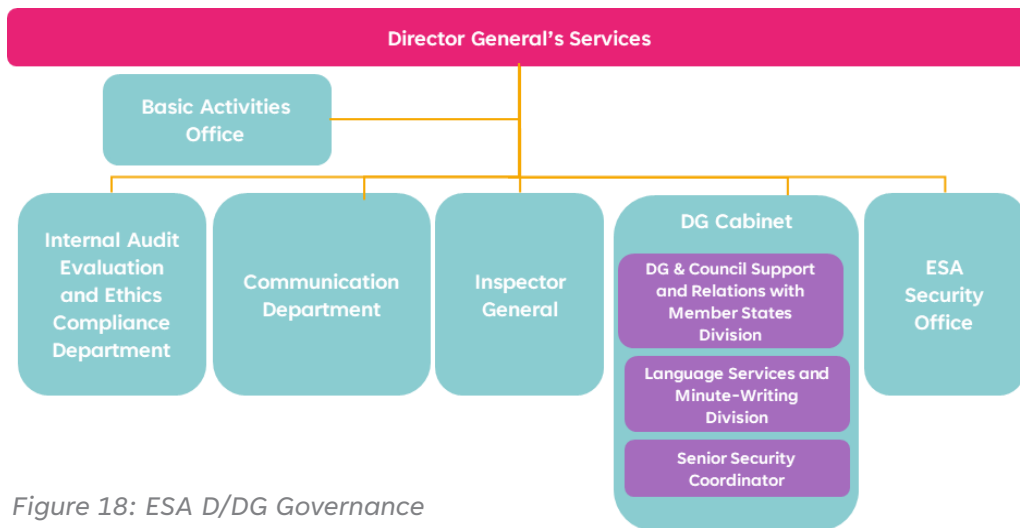


Figure 18: ESA D/DG Governance

Focusing on the **Directorate of Strategy, Legal and External Matters**, the Directorate is currently composed of three departments, and several offices and divisions. The **External Relations Department** provides the operational capacity and know-how for the administration of existing (and future) cooperation efforts. As a part of its international engagement, ESA maintains an external office in Washington DC.⁴⁵ Previously, ESA also had an external office in Moscow, which currently remains inactive. Moreover, amid deepening cooperation between ESA and Japan, the Agency established a new office in Tokyo at the end of October 2025.⁴⁶ The EU relations office, operating outside the External relations office, is present in Brussels with the ESA Brussels Office, and oversees relations with the EU institutions.



Figure 17: ESA D/SLE governance

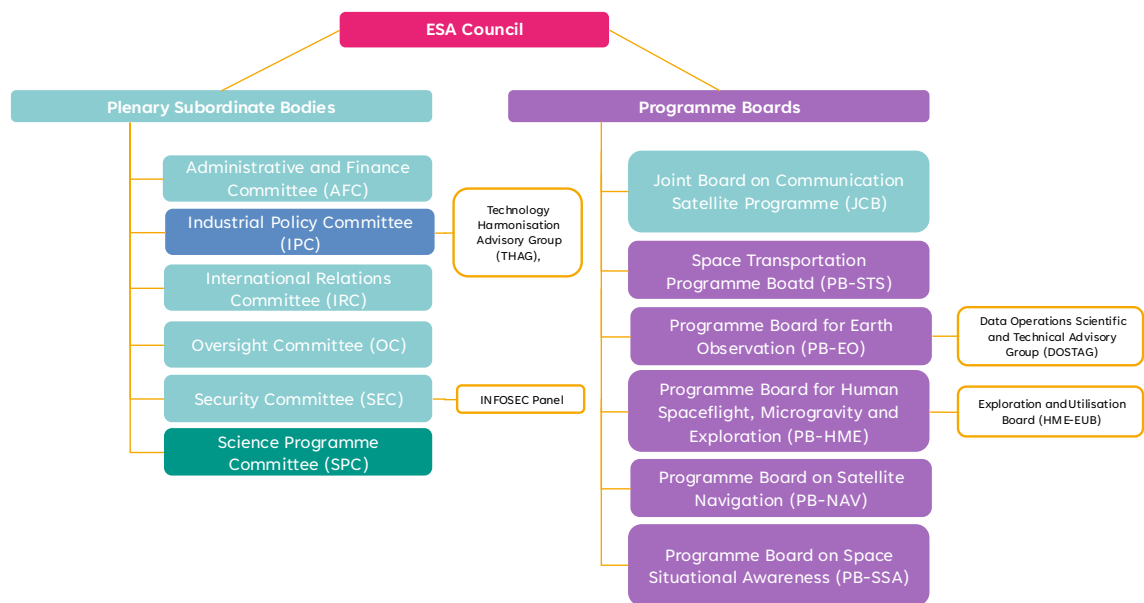
⁴⁵ European Space Agency. "ESA headquarters." ESA, n.d., (Link)

⁴⁶ European Space Agency. "ESA establishes presence in Tokyo to strengthen strategic partnership with Japan." (Link)



Subordinate bodies

The establishment, terms of reference and mandate of subordinate bodies are determined by a two-thirds majority of all Member States.⁴⁷ The role of Subordinate Bodies differs depending on the vested mandate, ranging from decisions and recommendations to monitoring the implementation of programmes. Each member state nominates its representatives, who are often accompanied by other experts. As planned in the Convention, the Council set up subordinate bodies to carry out certain duties in the governance of the Agency. In general, two types of subordinate bodies exist: Boards and Committees. As per the Convention, questions within subordinate bodies related to optional programmes are only voted on by participating states, except if all participating states decide otherwise.



*Coordination Committee for the implementation of the Inter-governmental Agreement on the International Space Station (IGA-CC)

Figure 19: ESA Council and its subordinate bodies

There are currently six Committees, generally concerned with overarching agency-wide matters, except for the SPC, which is specifically tied to a programme.⁴⁸

Administrative and Finance Committee (AFC)	AFC undertakes activities in close liaison with other boards and committees and acts as the financial arm of the Council. Its role is to make recommendations to Council, other programme boards and the Director General on matters related to staff, finances and legal affairs. Concretely the AFC's activities (i.a.) relate to the Agency's annual budgets, workforce planning and third-party financing. The AFC is internally supported by the
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⁴⁷ ESA, Convention for the Establishment of a European Space Agency (ESA/1297 UNTS 161). ESA, 30 May 1975 (Link)

⁴⁸ European Space Agency, "ESA's Organs and Functioning," ESA, n.d., (Link)



	<p>Directorate of Internal Services. The Advisory Group on the FFPA operates under the auspices of the AFC. The Advisory Group is currently inactive.</p>
<p>Industrial Policy Committee (IPC)</p>	<p>Initiated immediately in 1975, the IPC oversees ESA's Industrial Policy, one of the cornerstones of the Agency's raison d'être and continued relevance. Its role is to monitor and tweak the Agency's industrial policy to increase fairness in the access to ESA procurement by industry in all members (and cooperating) states, and across the variety of actors, including SMEs and start-ups. It does so by also holding the power to approve procurement and contract proposals submitted for undertaking the Agency's activities. The IPC is internally supported by the Directorate of Commercialisation, Industry and Competitiveness. Moreover, it defines suitable approaches for procurement in different ESA programmes with the aim of supporting the global competitiveness of European Industry. Finally, it is also competent for authorizing technology transfer outside ESA Member States. The Technology Harmonisation Advisory Group (THAG), created in 2006, also operates under the auspices of the IPC.⁴⁹</p>
<p>International Relations Committee (IRC)</p>	<p>The IRC is the key body in the monitoring of existing and the development of future international cooperation arrangements. Its role is in fact twofold:</p> <ul style="list-style-type: none">• it provides support to the Council in concerting space-related policies of Member States with respect to other national and international entities with the aim of upholding a common position within international bodies (e.g., COUPUOS), and• it provides recommendations and information regarding cooperation with international organisations and entities of non-Member States. <p>The EU is an observer. Furthermore, the IRC also provides assistance to other boards on matters that may affect international relations. Internally, the IRC is overseen and organised by the External Relations Department within the Directorate of Strategy, Legal and External affairs.</p>
<p>Security Committee (SEC)</p>	<p>The SEC advises the DG and Council on physical security (especially the protection of classified information and restricted access to infrastructure), industrial security policy and its implementation in contracts and procurements, and cyber resilience. The SEC is internally supported by the ESA Security Office under the Director General's Services. The INFOSEC Panel also operates under the auspices of the SEC.</p>
<p>Science Programme Committee (SPC)</p>	<p>The Convention explicitly stipulates the creation of the Science Programme Committee as a subordinate body, and assigns the SPC a fairly wide mandate: <i>"The Council shall establish a Science Programme Committee, to which it shall refer any matter relating to the mandatory scientific programme under Article V, 1 a (ii). It shall authorise that Committee to take decisions regarding that programme, subject always to the Council's functions of determining the level of resources and adopting the annual budget. The terms of reference of the</i></p>

⁴⁹ European Space Agency. "Harmonisation." (Link)



Science Programme Committee shall be determined by the Council by a two-thirds majority of all Member States and in accordance with this Article.” In practice, the SPC is endowed with the responsibility to identify, select and oversee the preparation and execution of projects within the scientific programme, while it also co-develops the Agency’s long-term plan for the Science Programme. Internally, the SPC is supported by the Directorate of Science.

In addition, the **Oversight Committee (OC)** consists of independent experts with relevant backgrounds and technical expertise, appointed by the Council to offer impartial and objective guidance on the effectiveness, efficiency, and accountability of ESA's internal control framework and assurance functions.

Programme boards

There are currently six Programme Boards, closely related to individual programmes. Created by the Council, each with its own field of activities, they can be consulted by any other board or committee on specific matters and have a duty to report to the Council when deemed necessary.⁵⁰

Programme Board for Earth Observation (PB-EO)	PB-EO, given its current name in 1986, oversees coordination for both European as well as some national EO activities. The board makes recommendations to the Council regarding future programme priorities and developments and is monitoring the implementation of existing programmes as well as data utilisation. It is supported by the Directorate of EO Programmes. The Data Operations Scientific and Technical Advisory Group (DOSTAG) also operates under the auspices of PB-EO.
Joint Board on Communication Satellite Programme (JCB)	The Joint Board on Communication and Satellite Programme was set up following a merger between the previous Communication Satellite Programme Board and the Maritime Satellite Programme Board. This board is competent in the field of telecommunications and integrated application programmes. As such it deals in a broad range of areas including mobile communications, broadcasting and business applications. Within ESA’s internal structure, the board is supported by the Directorate of Connectivity and Secure Communications.
Space Transportation Programme Board (PB-STS)	The PB-STS is the successor to the PB-LAU. Originally, the PB-LAU was set-up to follow up the Ariane Programme (the PB-LAU was formerly called Programme Board Ariane – PB-ARIANE). New programmes such as VEGA, Soyuz at CSG have been initiated since then and are also followed by this board. Launchers and space transportation is already identified as an area of the Agency’s activities within the Convention. Within ESA’s internal structure PB-LAU is supported by the Directorate of Space Transportation.

⁵⁰ European Space Agency, “ESA’s Organs and Functioning,” ESA, n.d., (Link)



Programme Board for Human Spaceflight, Microgravity and Exploration (PB-HME)	It coordinates and monitors various ESA activities related to human and robotic exploration as well as life and physical sciences application in space. Moreover, it is tasked with the coordination of the European contribution to the International Space Station (ISS). Within ESA's internal structure, PB-HME is supported by the Directorate of Human and Robotic Exploration Programmes. The Exploration and Utilisation Board for Human Spaceflight, Microgravity and Exploration (EUB) also operates under the auspices of PB-HME.
Programme Board on Satellite Navigation (PB-NAV)	The PB-NAV, created by ESA in 1999, is competent on satellite navigation programmes carried out in the frame of the Agency, which presently include EGNOS and Galileo. Within ESA's internal structure, PB-NAV is supported by the Directorate of Navigation.
Programme Board on Space Situational Awareness (PB-SSA)	The Programme Board on Space Situational Awareness is the most recently created programme board of the Agency. Its role is to coordinate and monitor the execution of the Agency's activities within the Space Safety Programme. Within ESA's internal structure, PB-SSA is supported by the Directorate of Operations.

In addition, there are also two bodies that were set up on an ad hoc basis and fall outside the framework of the Convention.⁵¹

Programme Advisory Committee (PAC)	PAC was set up in the framework of the special project related to the launch of sounding rockets and stratospheric balloons from Esrange (Sweden) and Andøya (Norway) and also oversees certain aspects of investments and developments in the two ranges.
Coordination Committee for the implementation of the Intergovernmental Agreement on the ISS (IGA-CC)	IGA-CC was set up by the Council in 1989 to coordinate and monitor the implementation of the ISS Intergovernmental Agreement (IGA) for the European Partner States (enabling them to act as one European Partner). The IGA-CC's mandate was to decide on common standpoints that each Government would endorse vis-à-vis the other Partners and examine proposed amendments and adopt the texts provided for under the Agreement. IGA-CC re-emerged as a relevant forum in the elaboration of ESA's approach to the Lunar Gateway.

3.3 ESA space policies & strategies

The ESA Convention establishes the mandate of ESA at the policy level, to be undertaken through an elaboration of a long-term European space policy, by recommending objectives to Member States and by concerting policies of Member States. ESA strategic documents set technology and mission priorities and strengthen Europe's strategic autonomy and

⁵¹ European Space Agency, "ESA's Organs and Functioning," ESA, n.d., (Link)



competitiveness. A summary of released policies and strategies between 2019 and 2025 is presented below in chronological order.

<p>ESA Strategy for Science at the Moon (2019)⁵²</p>	<p>ESA Strategy for Science at the Moon focuses on the new era of space exploration, in particular, lunar activities. The Strategy acknowledges the strategic scientific importance of lunar exploration and highlights the need for enhanced collaboration between different international and private sector actors. Selected key priorities include:</p> <ul style="list-style-type: none">• “Creating new opportunities for the European scientific community regarding lunar exploration”.• “Supporting the growth of the European industrial sector by developing and maintaining research capabilities, instruments, payloads and enabling technologies”.• “Generating new knowledge that prepares for future exploration activities”.• “Supporting new and existing international cooperations”.
<p>ESA Space Resources Strategy (2019)⁵³</p>	<p>The ESA Space Resources Strategy highlights the benefits and challenges of space resources utilisation within the general framework of space exploration. The Strategy outlines key action priorities for the period 2020–2030. Selected ones include:</p> <ul style="list-style-type: none">• “Confirming whether space resources can enable sustainable space exploration”.• “Identifying and creating new scientific and economic opportunities for the European industry and academia”.• “Enhancing technological capabilities and processing innovation for sustainability in space and on Earth”.• “Establishing ESA’s role as part of a broader community of international, public and private actors”.
<p>ESA Agenda 2025 (2021)⁵⁴</p>	<p>The Strategy aims to provide a reform-oriented vision to strengthen ESA’s role in Europe and globally. Key pillars include:</p> <ul style="list-style-type: none">• Boost ESA–EU cooperation.• Foster commercialization and New Space in Europe.• Green ESA: prioritize sustainability and climate action.• Strengthen space safety and security.
<p>ESA’s Strategy for Earth</p>	<p>Aims to shape the future of EO in Europe. Focus areas include:</p> <ul style="list-style-type: none">• Climate change and environmental monitoring.• Digital transformation through AI, Big Data, and cloud technologies.• Resilience to crises (natural disasters, pandemics, etc.).

⁵² European Space Agency. ESA Strategy for Science at the Moon. ESA, 2019 ([Link](#))

⁵³ European Space Agency. ESA Space Resources Strategy. ESA, 2019 ([Link](#))

⁵⁴ European Space Agency. ESA Agenda 2025. ESA, 2021 ([Link](#))



Observation 2040 (2024) ⁵⁵	<ul style="list-style-type: none">Strengthened partnerships with the EU (e.g., Copernicus), EUMETSAT, and commercial actors.
Terrae Novae 2030+ Strategy ⁵⁶	<p>This strategy presents ESA's vision for human and robotic exploration. Its objectives include:</p> <ul style="list-style-type: none">Human missions to the Moon and Mars in collaboration with National Aeronautics and Space Administration (NASA) and other partners.Robotic science missions (e.g., Mars Sample Return).Support infrastructure such as the Lunar Gateway and European Service Module (for NASA's Orion spacecraft).
ESA Explore 2040 (2024) ⁵⁷	<p>ESA Explore2040 advocates for enhanced exploration activities in the European sector, underlining their economic value, importance for the scientific contributions, and promotes that they affect every aspect of human life both on Earth and in space. Main goals of the Strategy include:</p> <ul style="list-style-type: none">“Achieving continuity with a sustained European presence in Low Earth Orbit (LEO)”.“Moon exploration”.“Expanding knowledge of the Red Planet”.
ESA Strategy 2040 (2025) ⁵⁸	<p>The Strategy encompasses a comparative analysis of Member State priorities, EU policies and evolving global and regional challenges regarding space policy. The five key priorities include:</p> <ul style="list-style-type: none">“Protecting our planet and climate”.“Exploring and discovering, especially in the low Earth orbit, around and on the Moon, and towards Mars”.“Strengthening European autonomy and resilience”.“Boosting European growth and competitiveness”.“Inspiring Europe to enhance its overall space capabilities”.

3.4 ESA activities and programmes

ESA programme and activities can be of two different natures, split between mandatory activities and optional programmes.

⁵⁵ European Space Agency. Earth Science in Action for Tomorrow's World – EO Science Strategy. ESA, 2024 ([Link](#))

⁵⁶ European Space Agency. Terrae Novae 2030+ Strategy Roadmap. ESA, 2022 ([Link](#))

⁵⁷ European Space Agency. ESA Explore2040. ESA, 2024 ([Link](#))

⁵⁸ European Space Agency. ESA Strategy 2040. ESA, 2025 ([Link](#))



ESA decisions regarding programmes and/or levels of funding are ultimately undertaken by the ESA Member States. The programmes are, however, elaborated and prepared within relevant Programme Boards or Committees before sent to Council. The process of elaborating, deciding on and undertaking programmes is different between what the Convention defines as Mandatory activities, on the one hand, and Optional activities, on the other.



Figure 20: Main features of ESA mandatory activities and optional programmes

3.4.1 Mandatory activities

Mandatory activities are first mentioned by Article I of the Convention but defined in more detail in Article V.1.a which stipulates that all Member States shall contribute to **Mandatory activities** of the Agency, including:

- Basic Activities such as education, documentation, future studies and technological research.
- Elaboration and execution of the Scientific Programme.
- Collection and dissemination of information with the aim of harmonising national and international programmes.
- Regular contact with space technology users to gather information on their requirements.⁵⁹

Analysing ESA's approved budgets, the **budgetary items** associated with mandatory contributions are:

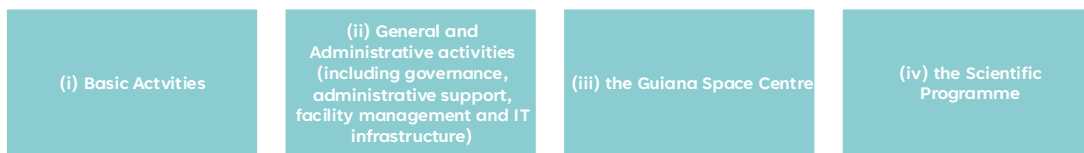


Figure 21: ESA mandatory contributions

With regard to basic activities and the scientific programme, the Council shall: (i) *approve the activities and programme by a majority of all Member States; (ii) and determine, by a unanimous decision of all Member States the level of resources to be made available to the Agency for the coming five-year period, as well as (iii) towards the end of the third year of each five-year period and after a review of the situation, the level of resources to*

⁵⁹ ESA, Convention for the Establishment of a European Space Agency (ESA/1297 UNTS 161). ESA, 30 May 1975 ([Link](#))



be made available to the Agency for the new five-year period starting at the end of this third year.⁶⁰

The Scientific Programme funds long-term space science missions and covers missions designed to explore the Solar System, study the Universe, and understand fundamental physics.

SCIENTIFIC PROGRAMME:

- **Four types of missions (building blocks):**
 - Large missions (European-led flagship missions; one mission approximately every 7-8 years)
 - Medium missions (flexible program element, ESA-led or with international collaboration, one mission approximately every 3-4 years)
 - Fast (F-) missions (faster, smaller missions, built in approximately 4-6 yrs, can allow national agencies to play a leading role).
 - Missions of Opportunity
- **Budget foundation for Science technology:**
 - Basic Activities (TDE); address low TRLs (3-4)
 - Science Core Technology Programme (CTP); address technology maturity (TRL 6)

Figure 22: Overview of scientific programme at ESA

3.4.2 Optional programmes

Optional programmes are the other crucial element in ESA's pursuit of fulfilling its mandate, also provided for in Article V.1.b of the ESA Convention. These are individual activities (programmes) or programme envelopes supported by either all or only some ESA Member States, whereby ESA "*shall ensure ... the execution of programmes*".⁶¹ Optional activities, based on proposals put forward by the Director General, and previously elaborated within Programme Boards, are confirmed and legally conceived by the ESA Member States through Programme Declarations, whereby any Member State has the right to declare whether it will participate therein. These Declarations legally represent an individual intergovernmental agreement related to a specific programme and are technically only sent to the ESA Council for it to take note, while the Council then adopts Enabling Resolutions and the related Implementing Rules based on the Declarations.

This follows the premise that ESA (as an International Organisation) is authorised to implement and execute the optional programmes created by the Declarations, whereas the Council adopts the Enabling Resolutions and Implementing Rules, as these are related to the execution itself. Council acts as a forum of intergovernmental cooperation, particularly in determining the decision on the content of optional activities, which are outlined in a

⁶⁰ ESA, Convention for the Establishment of a European Space Agency (ESA/1297 UNTS 161). ESA, 30 May 1975 ([Link](#)) Article V, 1 a (i) and (ii); Decisions to this effect may only be changed by new decisions adopted by a two-thirds majority of all Member States;

⁶¹ ESA, Convention for the Establishment of a European Space Agency (ESA/1297 UNTS 161). ESA, 30 May 1975 ([Link](#))



Programme Declaration.⁶² For that, ESA Member States have to agree between themselves, (i.e., at the intergovernmental level on a programme, “within the purposes and using the scientific and technical means of their common Agency”), which means that these actions are not carried out by the collective itself, even though discussions and decisions typically take place during in-person Council meetings.

Further details are set out in **Annex III** of the Convention which (i.a.) stipulates that participating states to an optional programme draw up a Programme Declaration which defines phases of the programme; conditions under which it is to be carried out, (i.a.), timing and indicative financial distribution; and the duration and amount of the first binding financial commitment.⁶³

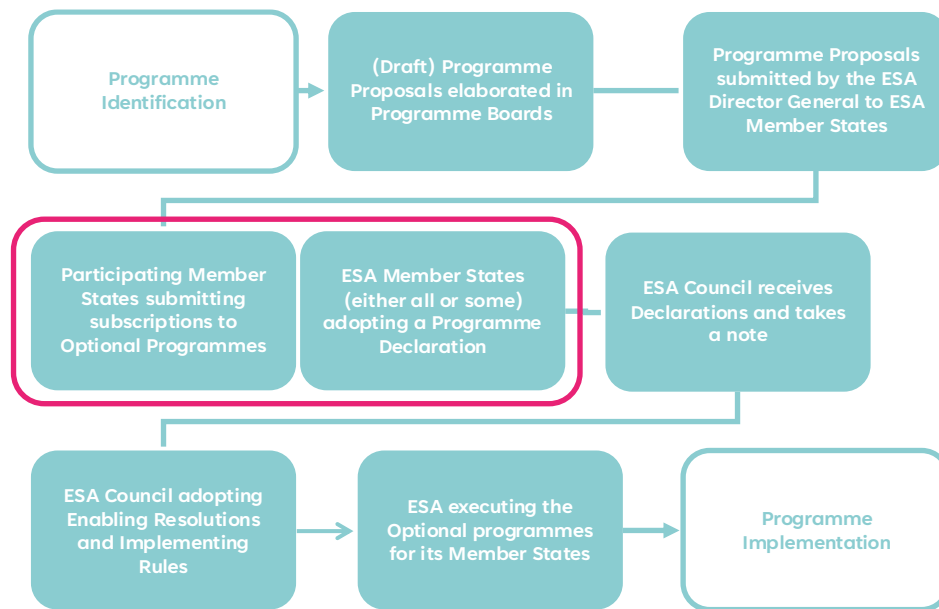


Figure 23: ESA optional programme process

The activities related to optional programmes envisaged in the Convention include “design, development, construction, launching, placing in orbit, and control of satellites and other space systems; and design, development, construction, and operation of launch facilities and space transport systems.”⁶⁴ A list of optional programmes, pillars and specific elements within, is presented below.⁶⁵

⁶² Marco Ferrazzani and Alexander Soucek. “Experiences from and Prospects for the ESA Convention.” *Zeitschrift für Luft- und Weltraumrecht - German Journal of Air and Space Law*, vol. 64, no. 2, 2015, pp. 288-309. HeinOnline

⁶³ ESA, Convention for the Establishment of a European Space Agency (ESA/1297 UNTS 161). ESA, 30 May 1975 ([Link](#))

⁶⁴ ESA, Convention for the Establishment of a European Space Agency (ESA/1297 UNTS 161). ESA, 30 May 1975 ([Link](#))

⁶⁵ European Space Agency (ESA), Meeting at Ministerial Level. Subscription to optional programmes at the CM25 (ESA/C-M(2025)100,REV.5). ESA, 1 December 2025 ([Link](#))

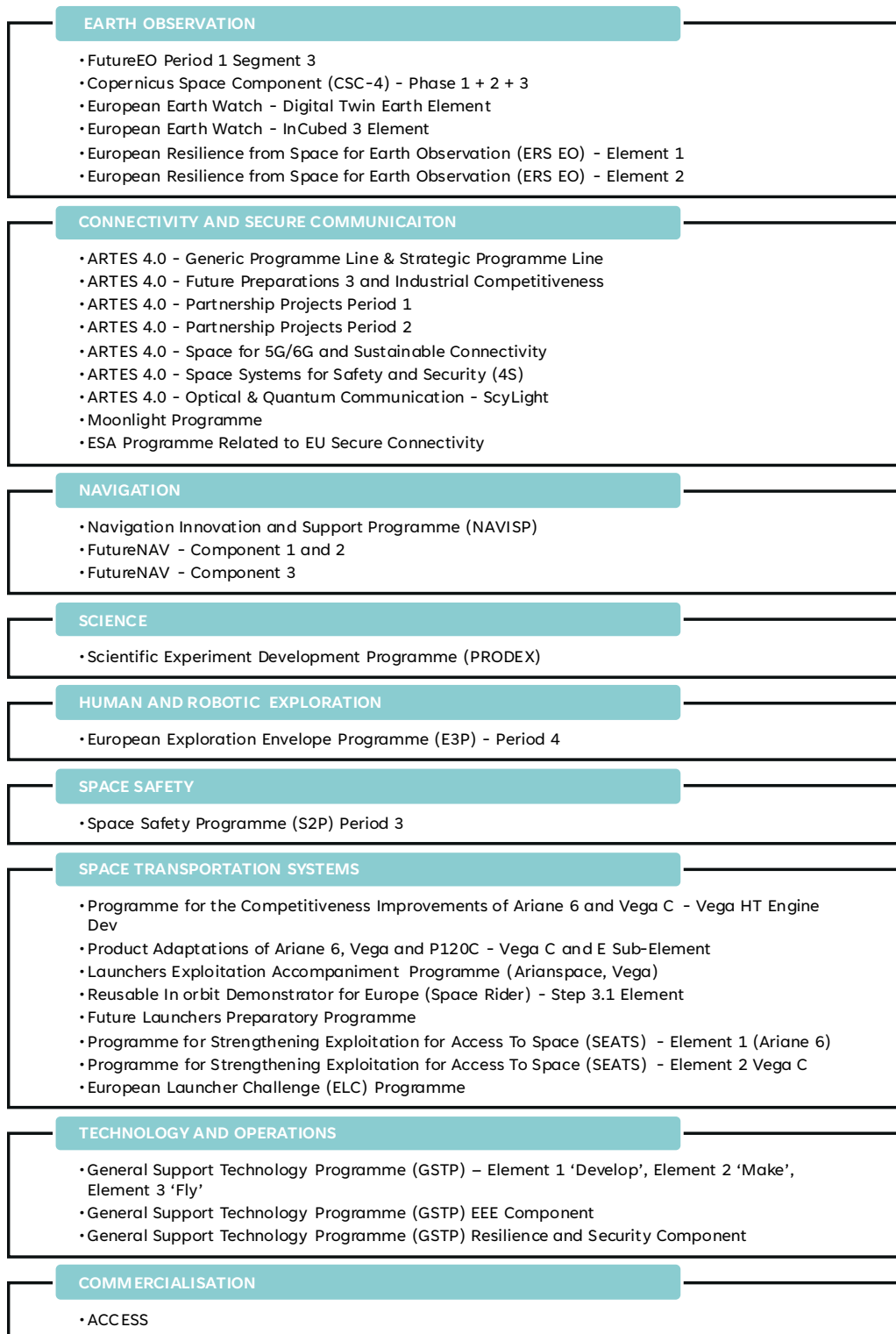


Figure 24: ESA optional programmes



3.4.3 Requesting party activities

ESA makes its own facilities available to any Member State that asks to use them for its own programmes (Art. IX.1 ESA Convention). This is done at the cost of the requesting State and only insofar as ESA activities are not jeopardised. In addition, Article IX.2 allows for **activities implemented on behalf of Member States outside Mandatory or Optional Programmes**. It states that “*if, outside the activities and programmes referred to in Article V but within the purpose of the Agency, one or more Member States wish to engage in a project, the Council may decide by a two-thirds majority of all Member States to make available the assistance of the Agency*”.⁶⁶ Likewise, ESA can make its assistance available to Member States that “wish to engage in a project” outside ESA programmes.⁶⁷

Some Member States use Article 9.2 of the ESA Convention to further develop their national capabilities. This provision enables any Member State, individually or jointly, to request ESA’s assistance for national programmes, making it possible to benefit from the Agency’s expertise. As previously mentioned, Italy is an example of a Member State that selected ESA to develop its national project — IRIDE.⁶⁸ Another example is the Greek National Satellite Space Project (GNTS), conducted by ESA, alongside the Greek Ministry of Digital Governance, Greek industry and academia, and funded by the Recovery and Resilience Facility.⁶⁹ In Spain, SEOSAT-Ingenio high-resolution land imaging satellite was funded by Spain’s Centre for the Development of Industrial Technology (CDTI) and developed and managed on Spain’s behalf. In Poland, the Ministry of Development and Technology partnered with ESA to coordinate the development of the CAMILA satellite constellation,⁷⁰ which was recently (in November 2025) extended to a four-satellite system and increased the overall ESA contract value to over EUR 59 million.⁷¹

3.4.4 Third parties activities

ESA also undertakes implementation activities on behalf of Third Parties, which is the commonly used term for contributing entities other than ESA Member States. Notably, this includes long-standing partnerships with the EU (particularly on systems evolution and design and development in the fields of Navigation and Earth Observation) and with EUMETSAT (primarily in the field of satellite meteorology). These cooperation frameworks

⁶⁶ ESA, Convention for the Establishment of a European Space Agency (ESA/1297 UNTS 161). ESA, 30 May 1975 ([Link](#))

⁶⁷ within the purpose of ESA; Art. IX para.2 ESA Convention)

⁶⁸ Telespazio. “IRIDE.” ([Link](#))

⁶⁹ It is part of the wider Greek National Satellite Space Project, which was launched in March 2019, by ESA and the Greek Ministry of Digital Governance as part of the Greek Connectivity Programme under Regulation (EU) 2021/241 and aligned with Greece’s Recovery Plan, approved on 6 July 2021. See [ESA managed Greek National Satellite Space Project meets key milestones | ESA CSC](#)

⁷⁰ Andrew Parsonson. “Poland Green Lights €52M EO Constellation.” [European Spaceflight](#), 16 April 2025 ([Link](#))

⁷¹ Creotech Instruments extends ESA contract under the CAMILA project ([Link](#))



have progressively evolved in response to programmatic needs, institutional developments, and accumulated operational experience.

To enable such cooperation, ESA has relied on an adaptive legal basis that has matured over time. The Agency has developed and applied different forms of Cooperation or Partnership Agreements, each grounded in specific provisions of the ESA Convention.

The first **ESA–EU framework agreement of 2004** was concluded on the basis of Article XIV (“COOPERATION”) of the ESA Convention. The Article provides that **ESA may upon decisions of the Council taken by unanimous votes of all Member States**, conclude agreement with other international organisations, institutions and with Governments. Subject to such unanimous decisions, the detailed arrangements for such cooperation are to be **defined in each case by the Council by a two-thirds majority** (of the States participating in the programme in question for cooperation, and of all Member States for associate membership).

Subsequently, the **EC-ESA–EUSPA Financial Framework Partnership Agreement (FFPA)** has been based on Article V (“Activities and Programmes”) of the ESA Convention, which allows ESA to execute programmes funded entirely by third parties, provided that participating Member States consent to ESA’s role and responsibilities. Article V.2 indeed provides that “in the area of space applications ESA may carry out operational activities under conditions to be defined by the Council by **a (simple) majority of all Member States**”.⁷²

Following the need to implement the Framework Agreement in 2004 in areas of common interest and programmes,⁷³ several Contribution Agreements and Delegation Agreements have been signed before and after FFPA for the implementation of specific EU initiatives, including Galileo and Copernicus, as well, more recently, on other matters such as Horizon Europe, secure connectivity and Destination Earth (DestinE).

Development and implementation of activities on behalf of EUMETSAT has been conducted under Article XI (“The Council”) and implemented under Article V.2 of the ESA Convention, which enables ESA to carry out activities for non-Member States or international bodies on a contractual basis.

Cooperation with third countries and space agencies

Article XIV (“Cooperation”) allows ESA, on the basis of **Council decisions taken by unanimous votes of all Member States**, to cooperate with Governments, organisations and institutions of non-member States and with other international organisations.

⁷² Art. XI d. “d. Except where this Convention provides otherwise, decisions of the Council shall be taken by a simple majority of Member States represented and voting. “

⁷³ Framework Agreement between the European Community and the European Space Agency, 2004 (Link) – Articles 5



Such cooperation may include the participation of non-member States or international organisations in ESA programmes under Article V, 1(a)(ii) (mandatory scientific programme) and Article V, 1(b) (optional programmes), with the detailed arrangements for each cooperation case adopted by the Council by a two-thirds majority of the States participating in the programme in question. This provision is the legal basis for cooperation with third-country space agencies (e.g. JAXA, KARI) in the implementation of ESA's mandatory and optional programmes.

For both ESA and Member States programmes, Article VI(2) (“Facilities and services”) of the ESA Convention foresees what can be called an “efficiency precept”: in implementing their respective programmes, both shall “endeavour to make the best use” of existing facilities and services, and refrain from setting up new facilities or services without having examined the possibility of using the existing ones first. This clause requires ESA and Member States, when implementing both ESA and national programmes, to prioritise shared use and rationalisation of current infrastructures over creating new ones, thereby constraining infrastructure decisions by a duty to avoid unnecessary duplication and to justify any new facility against the test of existing capabilities.

3.4.5 ESA sites and facilities

For programmatic implementation and coordination purposes, ESA has developed a network of specialised facilities and centres across Europe to support its diverse mission

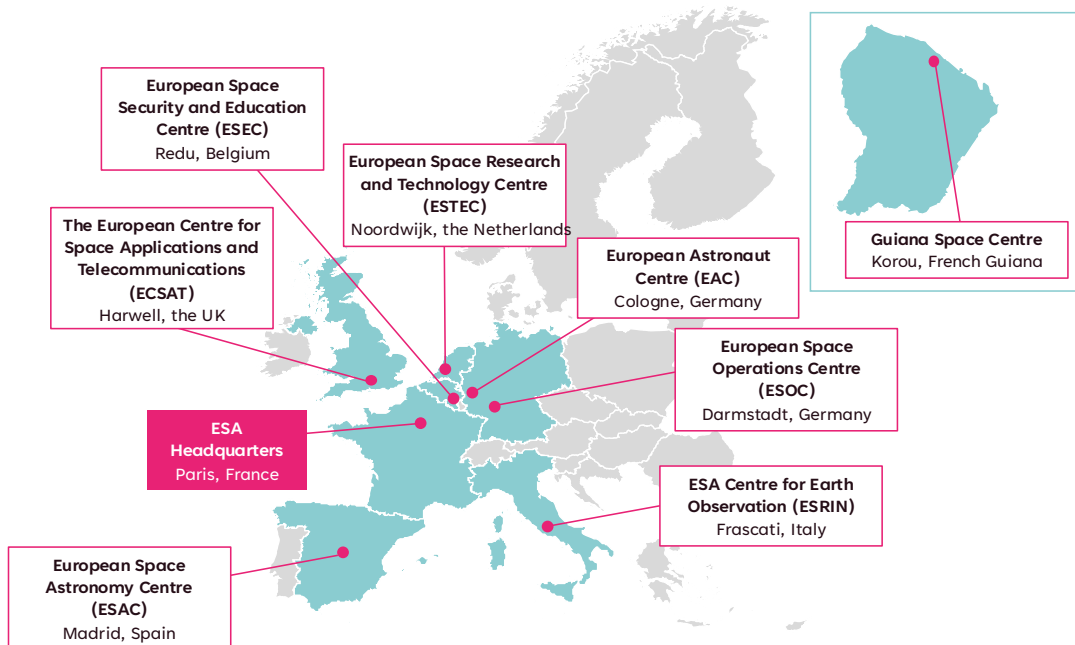


Figure 25: ESA centres



areas—ranging from Earth observation to human spaceflight, launch services, and space science.⁷⁴ Currently, ESA has its nine main establishments across seven Member States.⁷⁵ These establishments serve as operational, research, and coordination hubs and reflect ESA's distributed, collaborative structure among Member States. Moreover, at the end of 2025, ESA signed a letter of intent with Norway to advance efforts toward establishing a new ESA Arctic Space Centre in Tromsø and announced plans for creation of a new ESA security centre to be located in Poland.⁷⁶

ESA Business Incubation Centres

ESA also supports various commercialisation through initiatives like its **ESA Business Incubation Centres (BICs)**. Through the BICs, ESA supports space-related start-ups in Europe through business and technical advice, networking opportunities and even funding for the most promising projects. As of May 2025, the network operates in 23 European states with support of local partners in industry and academia.⁷⁷

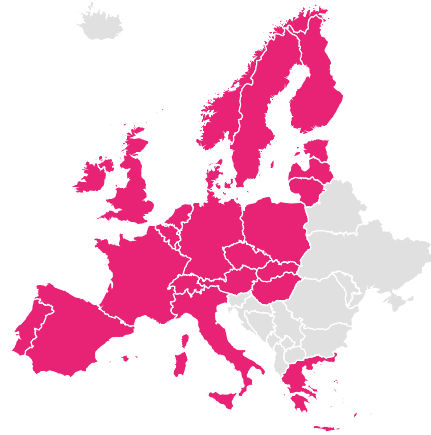


Figure 26: Countries with an ESA BIC

3.5 Overview of ESA Budget

ESA approved a budget of €7.7B for 2025, which includes activities implemented for other institutional partners, notably the European Commission and EUMETSAT. The budget includes approximately €5.06B from ESA Member States for ESA activities, €1.7B from the EU, and €1.2B in “other income”, including third-party activities for Member States. Germany, France and Italy remain the biggest contributors to the Agency’s budget.

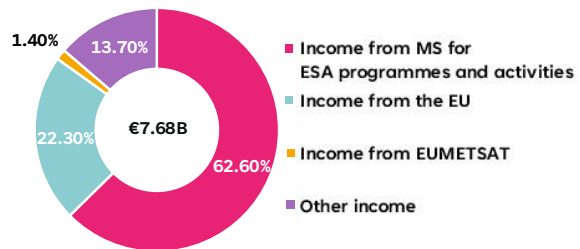


Figure 27: ESA budget 2025 by funding source, incl. Member States contributions in M€ (source: ESA)

⁷⁴ European Space Agency, “Establishments and Facilities.” ESA, (Link)

⁷⁵ in the France (ESA HQ in Paris and Europe’s Spaceport in French Guiana), the Netherlands (ESA ESTEC in Noordwijk), Germany (ESA ESOC in Darmstadt and ESA EAC in Cologne), Italy (ESA ESRIN in Frascati), Spain (ESA EAC in Villanueva de la Cañada), Belgium (ESA ESEC in Redu) and the UK (ESA ECSAT in Harwell).

⁷⁶ ESA. “ESA and Norway explore possibility of Arctic Space Centre.” ESA, (Link); ESA. “Poland and ESA discuss plans for new security centre.” ESA, (Link)

⁷⁷ ESA Commercialisation Gateway, “ESA BUSINESS INCUBATION CENTRES,” ESA, (Link)



3.5.1 Defining ESA's programmes and associated budgets

ESA's spending priorities and new programmes are decided upon roughly every three years during the CMs, with a potential to negotiate increased contributions from Member States for certain budget lines. During the last CM in 2025, Member States agreed on a record-breaking total budget of €22.3B for ESA, representing a 17% increase from the CM22 budget accounting for inflation.⁷⁸ The increase was largely fuelled by a significant growth in subscriptions to Space Transportation, as well as Technology, Navigation and Earth Observation.⁷⁹ ESA's European Resilience from Space programme was also approved during the CM, with subscriptions for this programme remaining open until November 2026.⁸⁰

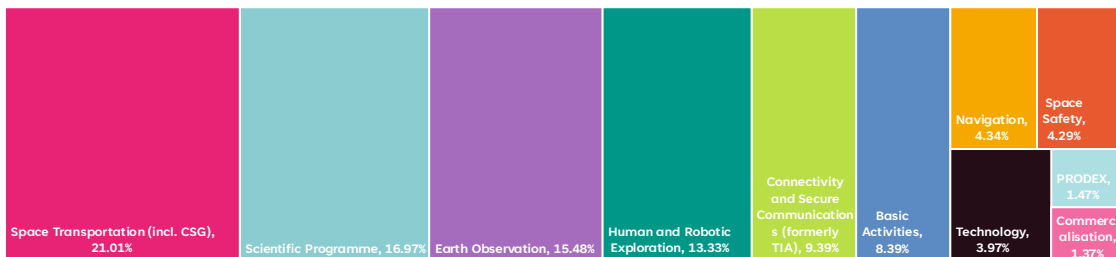


Figure 28: ESA Budget lines by relative percentage of subscriptions during CM25 (Source: ESA)

Under ESA budgetary policy, Member States are obliged to pay annual contributions. For the mandatory programmes, Member States contribute to the costs within a scale adopted by the Council every three years, based on the average national income. Regarding the optional programmes, States mainly contribute to costs based on their preferred interest and the national space programme goals.

Mandatory activities are covered by (mandatory) contributions of Member States, the ratios for which are calculated by applying a scale recommended by the AFC and adopted by Council every three years “based on the average national income of each Member State for the three latest years for which statistics are available”, with the caveat that no individual Member State shall cover more than 25% of the overall contributions. The current top-paying Member State in terms of mandatory contributions is covering around 20.5%, while the lowest mandatory contribution among the 22 Full Member States during CM22 was set at 0.13%.

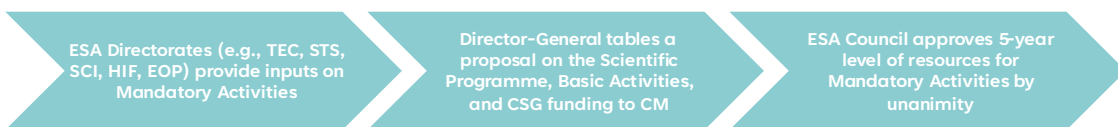


Figure 29: Mandatory activities budget decision process

⁷⁸ ESA, “ESA Member States commit to largest contributions at Ministerial” ESA , 2 Dec. 2025, (Linkk)

⁷⁹ Jeff Foust, “ESA raises more than 22 billion euros at ministerial”, *SpaceNews*, 27 Nov. 2025, (Link)

⁸⁰ Marc Boucher, “European Space Agency DG Aschbacher highlights 2026 milestones in annual address”, *SpaceQ*, Jan. 8 2026, (Link)



Optional programmes, on the other hand, are covered by Member States based solely on their interest in contributing to a specific programme. Member States subscribe to varying levels of contributions based on their own strategic orientations as well as national industrial capabilities, with some programmes (and elements) being supported by almost all Member States while others are strongly enabled by only a few Member States (with cases where one Member State is carrying over 80% of the programme cost).

In several programmes, the subscription is possible both at the general programme level as well as at project/activity/element level. In some cases, for individual elements, subscription thresholds are provided that need to be met for the programme to be pursued.



Figure 30: Optional programmes budget decision process

3.5.2 ESA industrial policy & geographical distribution principle

The **procurement for the execution of ESA activities and programmes** has been historically regulated by the Procurement Regulations and their Annexes, in accordance with the ESA industrial policy objectives set out in Article VII of the ESA Convention and Annex V.⁸¹ The **Contracting Regulations** entered into force in January 2025, replacing the ESA Procurement Regulations, constituting the foundational basis for the ESA's industrial policy.⁸² The purpose of the Contracting Regulations and their Annexes, which also constitute Implementing Instructions, is to regulate the Tender for the execution of the ESA activities and programmes, in accordance with the ESA industrial policy objectives set out in Article VII of its Convention and Annex V. Under the Article 48, the Contracting Regulations may be amended by the ESA Council on the recommendation of the Industrial Policy Committee and of the Administrative and Finance Committee.⁸³

ESA's industrial policy is designed, among other objectives, to ensure that all Member States participate in an equitable manner, regarding their financial contribution, in implementing the European space programme and in the associated development of space technology. In particular the Agency shall, for the execution of its programmes, grant preference to the fullest extent possible to **industry in all Member States**, which shall be given the maximum opportunity to participate in the work of technological interest undertaken for the Agency.

⁸¹ESA Procurement Regulations and related Implementing Instructions (ESA/REG/001, rev. 5). ESA, 10 July 2019 (Link)

⁸² European Space Agency. Approval and entry into force of the ESA Contracting Regulations and related Implementing Instructions. Approved by the ESA Council on 23-24 October 2024 (ESA/C (2024)115) (Link)

⁸³ European Space Agency. Regulations of the European Space Agency. ESA Contracting Regulations and related Implementing Instructions (ESA/REG/001, REV.6). ESA, 04 November 2024 (Link)



Meet the requirements of the European space programme and the coordinated national space programmes in a cost-effective manner

Improve the world-wide competitiveness of European industry by maintaining and developing space technology and by encouraging the rationalisation and development of an industrial structure appropriate to market requirements, making use in the first place of the existing industrial potential of all Member States

Ensure that all Member States participate in an equitable manner, having regard to their financial contribution, in implementing the European space programme and in the associated development of space technology

Exploit the advantages of free competitive bidding in all cases, except where this would be incompatible with other defined objectives of industrial policy.

Figure 31: Industrial policy objectives (ESA Convention)

In order to be able to monitor and, where appropriate, adapt the Agency's industrial policy, ESA permanently reviews the industrial potential and industrial structure in relation to the Agency's activities, and in particular the general structure of industry, and industrial groupings; the degree of specialisation desirable in industry and methods of achieving it; the coordination of relevant national industrial policies; interaction with any relevant industrial policies of other international bodies; the relationship between industrial production capacity and potential markets; and the organisation of contacts with industry.

The geographical distribution of all ESA's contracts is governed by the following general rules:

- A Member State's overall return coefficient is the ratio between its percentage share of the total value of all contracts awarded among all Member States and its total contributions.
- For the purpose of calculating return coefficients, weighting factors are applied to the value of contracts on the basis of their technological interest.
- Ideally the distribution of contracts placed by the Agency should result in all countries having an overall return coefficient of 1.

Geographical return is computed for each of the ESA programmes, in addition to the overall return coefficient. Limits have been fixed for the minimum return to be achieved in each category of programmes. Because of the geographical return principle, when configuring an industrial consortium in the process of preparing a proposal the participating companies due consideration is given to their nationalities and shares in the activities. An important factor is the locations where the different activities related to the contract will be conducted. ESA letters of invitation to tender often include specific requirements on the nationality of the companies allowed to bid. The letter of invitation to tender, or the special conditions of tender, may include specific requirements to implement



ESA's industrial policy. A typical example is the clauses C1 to C4, which aim to limit the participation of large systems integrators in certain types of activities and foster the participation of independent companies and SMEs.

ESA regularly inspects companies to determine that the work is performed according to the contract conditions. In addition to regular meetings covering technical and quality aspects, other controls address financial and managerial aspects (e.g., national audits). ESA audits companies to assess nationality for geographical return purposes, paying particular attention to companies in under-returned Member States and their subsidiaries. Whether a company should be considered to belong to one of the Member States for a specific activity, and to which one, is settled in the light of the following criteria: (i) location of the enterprise's registered office, (ii) decision-making centres and research centres, and (iii) territory on which the work is to be carried out. Paramount importance is given to value-adding aspects, both to the activity and to the company.

Evolution of the geographical distribution principle

ESA's geographical return principle is undoubtedly a powerful tool that enables Member States to commit more funding toward common European programmes, however **its efficacy in yielding competitiveness is often questioned, and justifies discussions on its reform.**⁸⁴ Openly addressed as far back as, and part of a special ESA Ministerial Council meeting of March 1997, a more recent example of such a call is the Draghi Report. It contends that it “*amplifies the fragmentation of the EU's space industrial base*”, leads to duplication of efforts and the allocation of resources to industrial actors that may not as competitive in the market as others, as well as prevents ESA from switching suppliers in cases of underperformance, yet without proposing a viable alternative.⁸⁵ **Some national government representatives and industry executives have also suggested that the way the principle is applied today can constrain their choices and their industry's competitiveness, arguing that the principle should be reformed in line with the changing space market environment, with France in particular being outspoken about the need for reform.**⁸⁶

Per these requests to modify or update the georeturn principle, **ESA Member States appointed a team of ESA officials, national representatives and industry experts to create recommendations for the principle's evolution.** The results of their work were presented during the 330th ESA Council Meeting in December 2024. Per ESA Director

⁸⁴ Didier Faivre and Bertrand de Montluc. “Tribune libre: le retour industriel dans les programmes de l'ESA. Vertus, limites, évolution.” *Air & Cosmos*, 2 November 2023 (Link)

⁸⁵ Draghi Mario, “The Future of European Competitiveness: Part B | In-Depth Analysis and Recommendations,” *European Commission*, September 9, 2024, (Link), p.179

⁸⁶ Jeff Foust, “European Governments and Companies Seek Changes to Georeturn,” *SpaceNews*, November 14, 2023 (Link) and Emma Gatti, “Diverging priorities shape opening day of ESA Ministerial 2025”, November 26, 2025 (Link)



General Josef Aschbacher, **the group confirmed “the fact that geo-return is absolutely important for the Member States”**, so ESA is not considering doing away with the principle altogether.⁸⁷ **Yet, the team recommended that georeturn should be simplified**, and that ESA should apply the principle more on broad “envelope-type” programmes, rather than on a project-by-project basis.⁸⁸

In a reverse georeturn style, an idea already discussed back in 1997, ESA also operates by selecting the best proposals, which are then submitted for acceptance to Member States. Subsequently, each Member States has the power to decide, and make financial contributions based on the success of nationally-affiliated industry.⁸⁹ This mechanism, **commonly referred to as “fair return”**, has been tested and implemented in several longstanding programmes, including Ariane 6 and the large platforms under ESA’s Advanced Research in Telecommunications Systems (ARTES) programme, where contracts are awarded through competitive tendering and industrial participation is balanced across Member States. More recently, this reform has been tested out in the European Launcher Challenge.⁹⁰

3.6 International cooperation

International Cooperation is not only a central prerequisite for ESA’s own governance but was also recognised as a crucial element of ESA’s pursuit to achieve its purpose. Article XIV of the Convention enables ESA to enter cooperation agreements namely with: (i) International organisations and institutions, and (ii) Governments, organisations and institutions of non-Member States, through participation in Mandatory and Optional activities.⁹¹ A relevant document within ESA’s framework for international cooperation is the ESA Council’s “Resolution on the Agency and its External Relations” adopted in 1977, which provides the basis on which the Agency is to conduct these activities, including a list of international cooperation activities proposed annually to Council by the DG.⁹² Additional documents providing guidance were adopted by Council, such as the “Guidelines to the Director General on the further developments of External Relations” in 1988, whereas Council Resolutions in 1991 and 1992 explicitly propose increased international cooperation.⁹³ In recent decades, ESA has built its reputation as a reliable partner for

⁸⁷ Andrew Parsonson. “ESA Director General Reaffirms Geo-Return Policy as ‘Fundamental!’” *European Spaceflight*, 2 January 2025 (Link)

⁸⁸ Jeff Foust, “ESA to Use Launch Competition to Test Georeturn Reforms,” *SpaceNews*, January 5, 2025, (Link)

⁸⁹ Douglas Gorman, “ESA Launches Its Launcher Challenge,” *Payload*, March 25, 2025,(Link)

⁹⁰ Jeff Foust, “ESA to Use Launch Competition to Test Georeturn Reforms,” *SpaceNews*, January 5, 2025, (Link); Andrew Parsonson, “ESA DG Reaffirms Geo-Return Policy as ‘Fundamental,’” *European Spaceflight*, Jan 2, 2025 (Link)

⁹¹ ESA, Convention for the Establishment of a European Space Agency (ESA/1297 UNTS 161). ESA, 30 May 1975 (Link)

⁹² European Space Agency, *Resolution on the Agency and its External Relations ESA.* , February 1977, (Link)

⁹³ Baudin, *supra* note 214 at 9.



cooperation with both third countries (e.g., U.S., Japan, and India) as well as international organisations (e.g., UN Environmental Programme, the World Bank, Asian Development Bank), in all areas of ESA's activities. The reasons for initiating cooperation can be as varied as the cooperation activities themselves, ranging from global development assistance and technological support following explicit requests, to leveraging synergies, sharing burden in resource-intensive missions and necessary reliance on third-country infrastructure, services and know-how for certain activities where ESA does not (yet) have autonomy or sufficient technological readiness.

All international cooperation must be unanimously approved by all Member States at Council level, whereby the identification of new opportunities generally first begins in the relevant programme board or committee. Detailed arrangements for such cooperation are defined by Council using two-thirds majority of Participating states. At the next step, the elaboration of proposed cooperation (as well as monitoring of existing cooperation agreements) is undertaken by the International Relations Committee.⁹⁴ The final step in the pursuit of a new international cooperation before sending a recommendation to Council, involves the AFC which checks the financial and legal compliance of the proposed cooperation. While most of development of international cooperation within ESA follows a bottom-up approach, the Director General nevertheless has discretion to enquire about potential cooperation opportunities with a specific partner.

The formal process following such an enquiry and potential identification of an appropriate partnership is followed by the standard formal procedure described above. ESA also cooperates with other international bodies. For instance, ESA collaborates closely with the UN, the Inter-Agency Space Debris Coordination Committee (IADC) and the Committee on Space Research (COSPAR), being actively engaged in shaping the international space policy discourse. Especially ESA's role in COPOUS is significant, as it provides an international platform facilitating discussions on governance and the long-term sustainability of outer space activities.

⁹⁴ Resolutions ESA/C/I/Res.2 and ESA/C/XLIX/Res. Ferrazzani & Soucek, *supra* note 212 at 300–301.



4 EUROPEAN UNION

The EU has progressively moved from a peripheral to an important role in space governance, primarily through strategic and policy consolidation, sustained investment in infrastructure and operations, and institutional partnerships, notably with ESA. It now plays a key role in defining strategic objectives and managing major space programmes. Nevertheless, the expansion of EU competences in this domain remains constrained. Space policy intersects with other areas, such as defence, where Member States retain primary authority and often resist further integration – though with a push for more dual-use and a reinforced synergies between space and defence by both Member States and the EU, some further support for European space & defence-relevant initiatives like IRIS² emerges. Still, while the EU has established itself as an important actor, the scope of its mandate and perimeter of action continues to depend on the degree of political consensus among Member States.

4.1 EU mandate (in space)

The EU began its engagement in the space domain with resolutions adopted by the European Parliament in the 1970s and 1980s. In parallel, the European Commission issued several communications in the late 1980s and 1990s, reflecting a strong emphasis on practical applications and notably contributing to the liberalisation of satellite communication markets. With the decision to develop flagship programmes on navigation

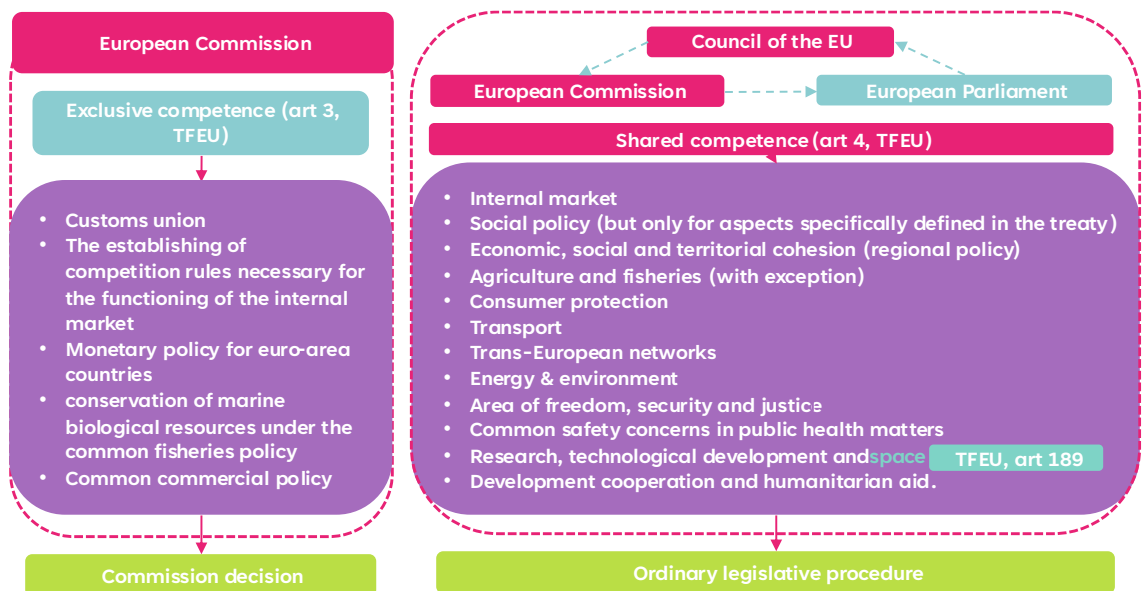


Figure 32: Competence Distribution under Articles 3 and 4 of the TFEU



(Galileo & EGNOS) and Earth observation (Copernicus), the influence of the EU in European space activities has actually increased over the past decades.

The Founding Treaties of the European Communities did not comprise specifications regarding competences in space matters, given that space was treated as a sovereignty- and security-sensitive field better handled intergovernmentally.

Foundations for EU competences in space activities have been created by the Lisbon Treaty. Since its entry into force in 2009, space has been defined as an area of EU policy, albeit as an area of shared responsibilities (transversal intervention area).⁹⁵

Article 2(2) of the Treaty on the Functioning of the EU (TFEU) establishes the concept of shared competences between the EU and its Member States as well as the application of the principle of pre-emption. *“The Union and the Member States may legislate and adopt legally binding acts in that area. The Member States shall exercise their competence to the extent that the Union has not exercised its competence. The Member States shall exercise their competence again to the extent that the Union has decided to cease exercising its competence”*.

Article 4(3) of the TFEU states that in areas such as space, *“the Union shall have competence to carry out activities, in particular to define and implement programmes; however, the exercise of that competence [by the Union] shall not result in Member States being prevented from exercising theirs”*. This provision constrains the extent to which the EU can unilaterally develop the European space programme. Unlike what usually happens on matters of shared competence, space matters are covered by a *sui generis* competence, parallel and symmetrical with respect to the State, as it leaves Member State authority to implement their own domestic legislation in the realm, even after the exercise of powers by EU institutions.

In this regard, Article 189(1) of the TFEU confers on the EU the mandate to develop and implement a European space policy while giving the EU a legal basis to act in the space sector, for example by developing space programmes. It associates the development of a European space policy with the EU's goal to pursue *“technical and scientific progress, industrial competitiveness and the implementation of its policies”*.⁹⁶ Article 189(2) of the TFEU limits the EU's competence to act in the field of space, expressly prohibiting any measures that would harmonise the laws and regulations of the Member States.⁹⁷

⁹⁵ Treaty of Lisbon amending the Treaty on EU and the Treaty establishing the European Community, 13 December 2007 (Link)

⁹⁶ Consolidated version of the Treaty on the Functioning of the European Union, 2007 (Link)

⁹⁷ The tasks of the Commission based on Article 28



4.2 Main space actors & responsibilities

The governance of the EU space activities is characterised by a complex institutional landscape, in which various bodies perform distinct yet interdependent roles. At the core, the **European Commission**, and in particular the **DG DEFIS under the Space and Defence Commissioner**, is entrusted with the strategic planning, coordination, and implementation of the EU Space Programme.⁹⁸ It holds the right of initiative to propose legislation in the field of space, ensuring consistency with broader EU policy objectives.

In certain cases, **EUSPA** is responsible for the operationalisation or implementation of the EU Space Programme.⁹⁹ The Agency is responsible for the security accreditation tasks for all the Union actions in the space sector.¹⁰⁰ The Agency is entrusted with user-uptake activities, as well as downstream application development activities for the Programme's components.¹⁰¹ Those activities should not prejudice the service and the user-uptake activities entrusted by the Commission to Copernicus entrusted entities. In addition, the Agency provides safe and secure positioning, navigation, and timing services based on Galileo and EGNOS, cost-effective satellite communications services for GOVSATCOM and IRIS2, and administers the EU SST Front Desk.¹⁰²

The **Council of the EU** addresses space policy through the Competitiveness Council (COMPET), which primarily deals with space matters of civilian nature, and through the Foreign Affairs Council (FAC), which handles security and defence-related space issues. In this configuration, ministers from the Member States play a pivotal role in shaping the future of European space policy, as they hold the policy deliberations, approve legislative acts, adopt policy orientations, and facilitate coordination with ESA. The **European Parliament** also plays an essential role, particularly through the Committee on Industry, Research, and Energy (ITRE), where it contributes to the legislative and budgetary process, and the Committee on Security and Defence (SEDE), which addresses the defence dimensions of space policy.

Another relevant institution is the **EEAS**, which shapes the CSDP elements of space, supports the security of the EU Space Programme, directs tasking of the EU SatCen, and supports the international and diplomatic dimension of EU space policy, particularly by promoting cooperation with strategic partners, third countries and representing the EU in multilateral forums of the United Nations. The EEAS is headed by the High Representative for Foreign Affairs and Security Policy and Vice-President (HR/VP).

⁹⁸ Regulation (EU) 2021/696 establishing the Union Space Programme and the EU Agency for the Space Programme (Link)

⁹⁹ EUSPA. "About EUSPA." (Link)

¹⁰⁰ Regulation (EU) 2021/696 establishing the Union Space Programme and the EU Agency for the Space Programme (Link)

¹⁰¹ Regulation (EU) 2021/696 establishing the Union Space Programme and the EU Agency for the Space Programme (Link)

¹⁰² EUSPA. "About EUSPA." (Link)

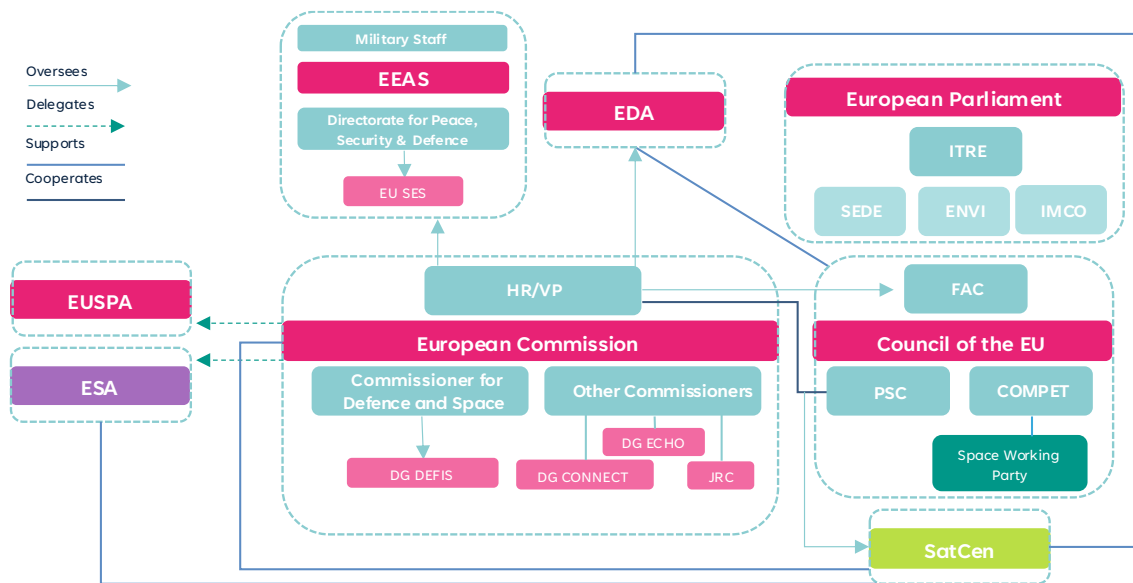


Figure 33: Interaction of EU bodies related to space

In addition to these core actors, several specialised agencies and bodies contribute to EU space policy within specific operational or thematic areas. While their mandates differ, they complement the work of the European Commission and Member States by providing technical expertise, operational support, or regulatory oversight in domains where space activities intersect with security, environment, or transport policies:

- The **European Defence Agency** is an intergovernmental body established under the authority of the Council of the EU. Chaired by the High Representative of the Union for Foreign Affairs and Security Policy/Vice-President of the European Commission (HR/VP) and governed through a Steering Board composed of Member States' defence ministers, it provides the Council with expertise and coordination in capability development, research, and defence innovation. EDA fosters cooperation between civilian and defence space domains, notably in areas such as secure communications, situational awareness, and dual-use technologies.¹⁰³
- The **EU Satellite Centre (SatCen)** is an agency under the Common Foreign and Security Policy / Common Security and Defence Policy of the EU working under the political supervision of the Political and Security Committee and the operational direction of the HR/VP, overseen by the Special Envoy for Space at EEAS (Chair of the board of MS). It supports the EU's foreign and security policy, by providing geospatial intelligence and satellite imagery analysis to the Council, EEAS, Member States, and EU missions and operations.¹⁰⁴ SatCen cooperates with European Commission implementing Copernicus

¹⁰³ Council Joint Action 2004/551/CFSP of 12 July 2004 on the establishment of the European Defence Agency, Official Journal of the European Union, L 245, 17 July 2004; Treaty on European Union, Article 45.

¹⁰⁴ EU Satellite Centre (SatCen), Annual Report 2024 published in 2025 (Link)



SESA and border monitoring with Frontex. The Centre also engages with international organisations and third countries.

Other agencies and EU structures increasingly use space-based data and services include the European Maritime Safety Agency (EMSA), the European Fisheries Control Agency (EFCA), Frontex (European Border and Coast Guard Agency), EUROPOL, European Environment Agency (EEA), Eurocontrol, European Union Aviation Safety Agency (EASA), SESAR Joint Undertaking, HISDEA and the European Research Council (ERC). EMSA, EFCA, Frontex, and EUROPOL rely increasingly on EO data and satellite services to support maritime surveillance, border management, and law enforcement.¹⁰⁵ EEA and Eurocontrol utilise data products from Copernicus for environmental protection, air quality monitoring, and air traffic management.¹⁰⁶ EASA contributes to the development of safety and regulatory frameworks for launch, re-entry, and high-altitude operations, and supports the Commission and Member States in aligning aviation and space safety regimes.¹⁰⁷ ERC and SESAR Joint Undertaking fund research and innovation programmes involving the application of space technologies in transport, climate adaptation, and digital infrastructure.¹⁰⁸ Finally, the European Centre for Medium-Range Weather Forecasts (ECMWF) underpins EU downstream exploitation by operating Copernicus services (notably CAMS and C3S) on behalf of the Commission, and within Destination Earth (DestinE) acts as an EU entrusted entity (together with ESA and EUMETSAT) delivering the first high-priority Digital Twins and the Digital Twin Engine that fuse satellite observations with advanced Earth-system modelling for decision support.¹⁰⁹ Many of these organisations, including SatCen and EEA, also serve as Copernicus Entrusted Entities — service providers who implement and operate Copernicus service via a delegation agreement from the Commission.¹¹⁰

In addition to the core and specialised bodies directly involved in the governance and implementation of EU space activities, several institutions contribute analytical, financial, and strategic capabilities that underpin the Union’s overall space policy framework:

- The **Joint Research Centre (JRC)** provides independent scientific and technical advice to support EU space policy and related legislation. It contributes analytical expertise

¹⁰⁵ European Maritime Safety Agency (EMSA), Consolidated Annual Activity Report 2024 published in 2025, (Link); European Fisheries Control Agency (EFCA), Annual Report 2024 published in 2025, (Link); Frontex, Consolidated Annual Activity Report 2024 published in 2025, (Link); Europol, European Union Serious and Organised Crime Threat Assessment (SOCTA) 2025, (Link)

¹⁰⁶ EEA, Europe’s environment 2025 – Knowledge for resilience, prosperity and sustainability, Report 11/2025, 2025, (Link); Eurocontrol, Performance Review Report 2024 – European ATM Network Overview, 2025, (Link)

¹⁰⁷ EASA, Proposal for a Roadmap on Higher Air and Space Operations, March 2023 (Link); European Commission, An EU Approach for Space Traffic Management, February 2022 (Link)

¹⁰⁸ European Research Executive Agency (REA), Annual Activity Report 2024, Brussels, 2025; SESAR 3 Joint Undertaking, Annual Report 2024 published in 2025, (Link)

¹⁰⁹ European Centre for Medium-Range Weather Forecasts. “What we do.” ECMWF (Link), European Centre for Medium-Range Weather Forecasts. “Destination Earth.” ECMWF (Link)

¹¹⁰ Copernicus, “FAQ: Who provides the Copernicus services?”, n.d., (Link)



in areas such as EO, satellite navigation, space safety, and climate monitoring, ensuring that policy decisions are grounded in robust evidence and data-driven assessments.¹¹¹

- The **European Investment Bank (EIB)** finances space-related infrastructure, innovation, and industrial projects that enhance Europe's technological sovereignty and competitiveness. Through instruments such as the InvestEU programme and dedicated support for the space sector, the EIB helps bridge investment gaps and foster the growth of the European space economy.¹¹² EIB is setting up Space TechEU, its first dedicated financing programme for the European space sector.¹¹³

4.2.1 The European Commission

The European Commission supervises the comprehensive development of joint space-related activities at the EU level. It ensures the coherence of activities carried out within its framework and owns the assets created or developed under it. It shapes and oversees the Union's Space Programme by assessing current trends, identifying emerging challenges, and aligning the programme's objectives with broader EU priorities such as innovation, economic growth, and security. Additionally, the Commission actively supports the growth and competitiveness of the European space industry.

Space under European Commission President Ursula von der Leyen

Ahead of her reconfirmation on July 18, 2024, President Ursula von der Leyen outlined her **Political Guidelines for the next five years**. Her agenda emphasises “Sustainable Prosperity and Competitiveness” alongside “Defence and Security”, marking a shift from her previous term. Key announcements for the space sector include: the increase in EU research funding; the Defence Union; the launch of a Preparedness Union Strategy to develop a cyber-defence industry; the maintenance of ambitious climate goals requiring advanced monitoring capabilities; the increase of engagement in long-term international partnerships.¹¹⁴

The Commission's evolving priorities in the space sector and other areas can also be traced annually in the **State of the EU (SOTEU) speeches**, and the accompanying **Letters of intent from the Commission President** to the President of the European Parliament and the Presidency of the Council of the EU. Published each September (except for the transition year of the European elections) these documents respond to

¹¹² The European Investment Bank. EIB Group Activity Report 2024. EIB, 2025 (Link)

¹¹³ The European Investment Bank. “EIB launching Space TechEU programme to scale up Europe's space sector.”, EIB, 26 November 2025 (Link)

¹¹⁴ European Commission, *Europe's Choice: Political Guidelines for the next European Commission 2024-2029*, 2024, July 2024 (Link)



external developments (e.g., COVID-19 pandemic). Concerning the previous term, in 2020, the only space-related initiative outlined was a proposal for an Action plan on synergies between civilian, defence, and space industries. By 2021, references remained limited to existing programmes (e.g., Galileo, IRIS²). However, in 2022 and 2023, the focus shifted towards legislative and strategic initiatives, notably the EU Space Law and the Space Strategy for Security and Defence, signalling a growing emphasis on the regulatory and programmatic dimensions of the EU Space Programme. In her 2023 Letter of Intent, von der Leyen also tasked former ECB President Mario Draghi with drafting a report on European competitiveness, which includes proposals relevant to the space sector.¹¹⁵

Following the 2024 European elections, the European Commission introduced a new portfolio, that of **Commissioner for Defence and Space, currently held by Andrius Kubilius**, under the coordination of the Commission Executive Vice-President for Technological Sovereignty, Security and Democracy.

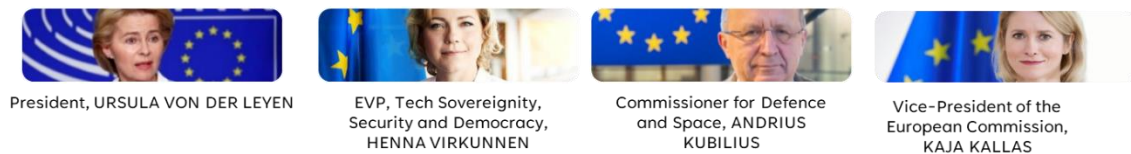


Figure 34: Key European Commission roles in Space decision-making

The **Mission Letter** from President von der Leyen to Commissioner Kubilius outlines the political priorities and expectations for his mandate, reflecting the ambition to elevate space policy as a central pillar of the EU’s geopolitical and technological strategy.¹¹⁶

The implementation of these objectives is supported by the **Directorate-General for Defence Industry and Space (DG DEFIS)**. Established during the 2019–2024 Commission, DG DEFIS is responsible for the development and implementation of EU policy on defence industry and space. It oversees the EU Space Programme, and is responsible for fostering a strong and innovative space industry, with the objective to maintain the EU’s autonomous, reliable, and cost-effective access to space.¹¹⁷ It also aims to make the most of space assets in order to reach Europe’s climate objectives, and works on improving the link between space and defence activities. In addition, DG DEFIS is supporting the development of space research and innovation activities, which are funded through the

¹¹⁵ European Commission, State of the Union 2023 - President von der Leyen's letter of intent (Link)

¹¹⁶ European Commission, Mission Letter from Ursula von der Leyen to Andrius Kubilius, September 2024 (Link)

¹¹⁷ Defence Industry and Space. “DG DEFIS webpage.” (Link)



Horizon Europe programme. It also supports the commercialisation with the Space Entrepreneurship Initiative CASSINI.¹¹⁸



Figure 35: Commissioner's Kubilius responsibilities as detailed in the Mission Letter

As part of the **DG DEFIS Management Plan 2025**, the overarching EU priorities—competitiveness, closing the EU innovation gap, and reducing strategic dependencies while increasing security— are operationalised specific space-related objectives, including:

- Strengthen the EU's competitiveness, resilience and autonomy through the provision of modern and well-functioning EU space assets and EU space-enabled services
- Provide reliable EU space-based data and services as cornerstones for the monitoring of, and transition to, climate-neutrality and ecological sustainability as well as preparedness and crisis management thanks to the EU Space Programme.¹¹⁹

From a structural point of view, the European Commission avails itself of several Expert Groups and other similar structures. In this context, DG DEFIS is supported by the **Space Policy Expert Group (SPEG)**, which advise the Commission in the preparation of policies and activities in implementation of Article 189 TFEU.¹²⁰

The Commission has also historically and recently established several **expert groups and other supporting bodies**, including the EuroQCI Working Group, the Expert Group for the

¹¹⁸ Those tasks were previously carried out by the Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs (DG GROW), which remains responsible for EU policy on the single market, industry, entrepreneurship and small businesses.

¹¹⁹ Directorate-General for Defence Industry and Space, Management Plan 2025. European Commission (Link)

¹²⁰ European Commission, "Register of Commission Expert Groups and Other Similar Entities," n.d. (Link)



Observatory of critical technologies in defence, space and related civil industries, Stakeholder Mechanism on Space Traffic Management (STM), the EU EO Governmental Service (ad hoc group), the GOVSATCOM USER and Technical Working Group, the Search and Rescue Evolution Task Force (SARE-TF), and the Copernicus User Forum.

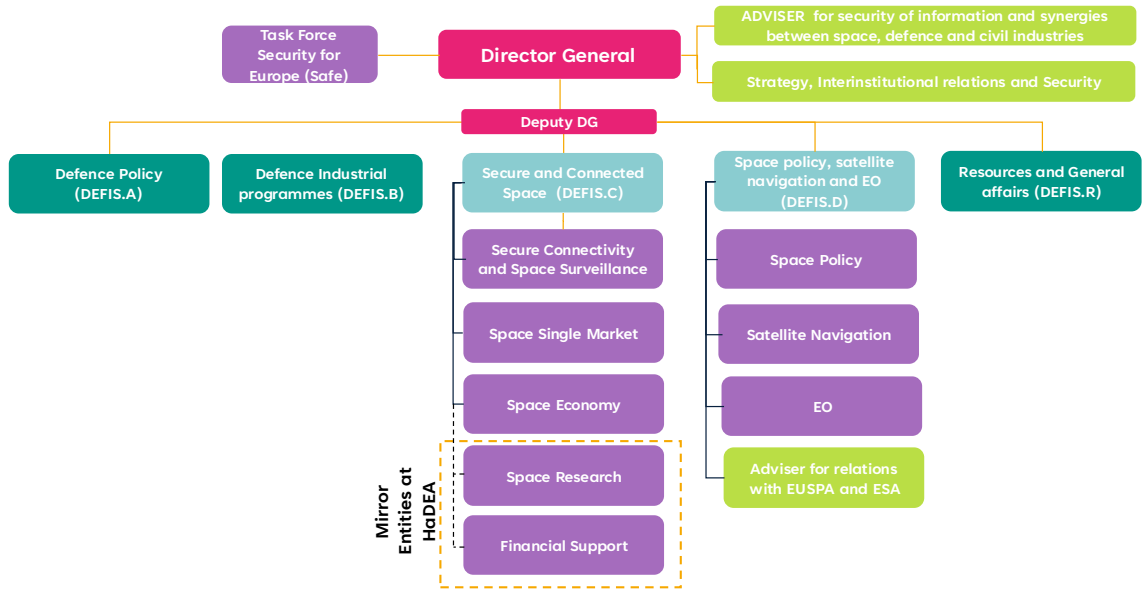


Figure 36: DG DEFIS Organizational Chart (Status as of October 2025)

Within the Commission, while DG DEFIS holds primary responsibility for space policy, **other Directorates-General and entities contribute to space-related initiatives in line with their respective mandates, and from a more user-oriented perspective.** This reflects the increasingly transversal nature of space as a policy domain.

<p>DG for European Civil Protection and Humanitarian Aid Operations (DG ECHO)</p>	<p>Involved in leveraging space-based services (e.g. satellite imagery, Copernicus Emergency Management Services) to support civilian protection, crisis response, and humanitarian aid.</p>
<p>DG for Communications Networks, Content and Technology (DG CONNECT)</p>	<p>Leads the Destination Earth (DestinE) initiative, which uses high-performance computing, AI, and Earth observation data (primarily from Copernicus) to model the Earth system digitally. DG CONNECT is also engaged in initiatives relating to cybersecurity and digital infrastructure. Developed the European Quantum Communication Infrastructure (EuroQCI) initiative to provide quantum-secure communications through a terrestrial fibre network and space-based satellite constellation.</p>



DG for International Partnerships (DG INTPA)	Employs space applications to support sustainable development, particularly in agriculture, climate monitoring, disaster risk reduction, and global partnerships, in line with the Global Gateway Strategy.
DG for Research and Innovation (DG RTD)	Provides funding and strategic guidance for space-related research and innovation through Horizon Europe, supporting both upstream areas (e.g., space science, launch technologies) and downstream applications (e.g., data services, commercial uses).
DG for Environment (DG ENV)	Makes extensive use of Earth observation data – primarily from Copernicus – to monitor and enforce EU environmental legislation. This includes applications in biodiversity, air and water quality, land use, and ecosystem health.
DG for Climate Action (DG CLIMA)	Integrates space-based data into climate adaptation and mitigation policies, greenhouse gas monitoring, and climate risk assessments, notably via the Copernicus Climate Change Service.
DG for Internal Market, Industry, Entrepreneurship and SMEs (DG GROW)	Oversees industrial policy aspects relevant to the space sector, including support for space industrial ecosystems, standardisation, and competitiveness. DG GROW also plays a coordinating role in relation to industrial supply chains, complementing the work of DG DEFIS.
DG for Mobility and Transport (DG MOVE)	Utilises satellite-based navigation and communication services to support smart and sustainable mobility, covering all transport modes—aviation, maritime, rail, and road. It also contributes to initiatives related to military mobility and the integration of GNSS services in transport systems.
Joint Research Centre (JRC)	The Commission's in-house scientific body provides technical expertise and policy support across a wide range of space applications, including environmental monitoring, agriculture, disaster risk reduction, and security. The JRC routinely uses satellite data to underpin evidence-based policymaking and routinely supports the Observatory of Critical Technologies
Health and Digital Executive Agency (HaDEA)	It is an executive agency, which implements the space R&D topics under cluster 4 of the Horizon Europe programme, including calls related to space technologies. HaDEA works in coordination with EUSPA, DG DEFIS, DG RTD, and DG CONNECT to support the development and deployment of space-enabled solutions.



4.2.2 EU Agency for the Space Programme

EUSPA is the operational agency of the EU Space Programme, established under Regulation (EU) 2021/696¹²¹. Building on the legacy of the European GNSS Agency (GSA), EUSPA's role has been significantly broadened.

A key dimension of EUSPA's mission is the security accreditation of all components of the EU Space Programme. This task is overseen by the Security Accreditation Board (SAB), a body within the agency that operates independently in the performance of its duties. The SAB is composed of representatives from all Member States, the European Commission, and the High Representative for Foreign Affairs and Security Policy. The SAB defines accreditation strategies, supervises compliance processes, and approves the deployment and operation of infrastructure components. It plays a central role in maintaining the confidentiality, integrity, and availability of space systems, particularly Galileo's PRS and the broader GOVSATCOM services. Security operations also involve continuous threat monitoring and coordination through the Galileo Security Monitoring Centres (GSMCs), which serve as operational hubs for managing space and ground-based security incidents.

EUSPA's mandate also encompasses the operational management of several components of the EU Space Programme, namely Galileo, EGNOS, GOVSATCOM, and SSA. In particular, according to the aforementioned Regulation, EUSPA is **responsible for the exploitation of the Galileo and EGNOS navigation systems**. This includes managing service delivery, ensuring performance monitoring, user support, and market development across diverse sectors such as transport, timing and synchronization, agriculture, emergency response, and public safety. The agency also operates the Galileo Security Monitoring Centre (GSMC) and manages the Galileo Public Regulated Service (PRS), a secure navigation service for governmental users. **Under its expanded mandate, EUSPA plays a coordination role in the GOVSATCOM initiative**, implementing the user needs for secure governmental communications developed by the Commission, EDA and EU Member States, and supporting the design and deployment of services that meet these needs. **Regarding Copernicus**, EUSPA contributes mainly through market development and user uptake activities, while programme management and service operations remain under the Commission and entrusted entities. EUSPA also contributes to SSA by supporting user-oriented aspects and fostering the development of downstream applications for collision avoidance, threat detection, and situational analysis.

EUSPA manages a network of operational and technical facilities across Europe:

- Galileo Control Centres in Oberpfaffenhofen (Germany) and Fucino (Italy), responsible for system operations and constellation management.

¹²¹ Regulation (EU) 2021/696 establishing the Union Space Programme and the EU Agency for the Space Programme (Link)



- GSMCs, which is based on two sites: one in Saint-Germain-en-Laye (France) and a second in San Martín de la Vega (Spain), focused on real-time security operations, where the EU SST Front Desk also sits and manages the SST Portal, which is the interface for the provision of EU SST services.
- European GNSS Service Centre in Torrejón de Ardoz, Spain, serving as the interface between Galileo and users, offering helpdesk services, performance reports, and technical documentation. Galileo Reference Centre in Noordwijk, Netherlands, conducting independent performance verification.
- Galileo Integrated Logistics Support Centre in Transinne, Belgium, which handles logistical support and system maintenance.

Finally, the **agency supports the uptake of space-based services and data, fosters innovation in downstream markets** through market intelligence, technical support, and dedicated funding mechanisms. As the implementing body for Horizon Europe's space segment, EUSPA issues calls targeting entrepreneurs, start-ups, SMEs, and researchers to stimulate the development of GNSS, Copernicus, and SSA-based services.

EUSPA also promotes the uptake of space solutions by public administrations and industries, facilitating user engagement through roadmaps, thematic studies, and co-

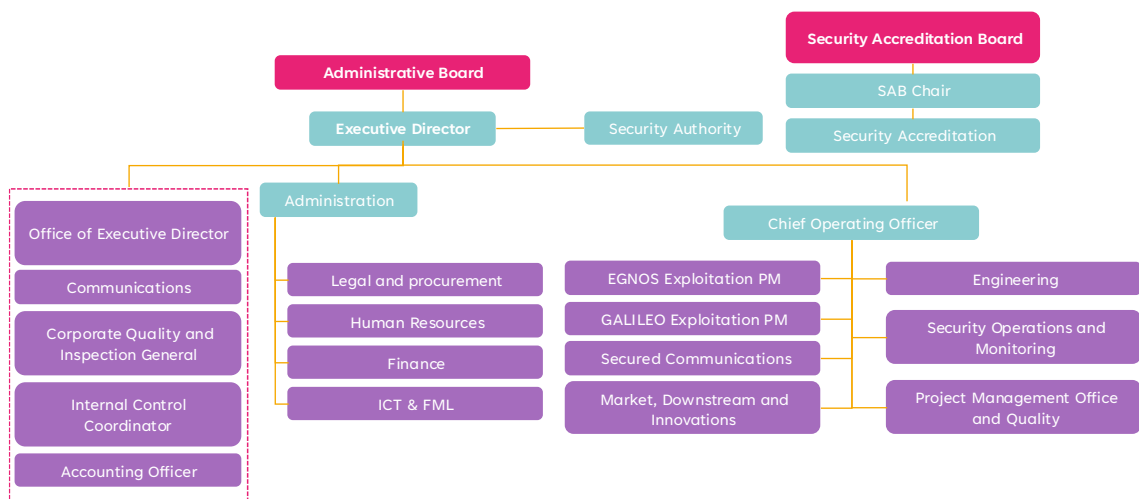


Figure 37: Organisation and governance of EUSPA

design approaches. It collaborates closely with other EU agencies, Member State authorities, and international partners to ensure cross-sectoral application of space services in mobility, emergency response, energy, environment, and secure communications.

From a governance perspective, **EUSPA operates under a multi-level governance framework, supervised by two main bodies:**



- The **Administrative Board**, composed of representatives from all EU Member States, three representatives from the European Commission, and a non-voting observer from the European Parliament. It oversees the agency's strategic direction, approves the annual and multiannual work programmes, and ensures compliance with EU policy priorities.
- The Security Accreditation Board (SAB), which is structurally independent from the operational branches of the agency and ensures the secure implementation of the space programme's components.
- The **Executive Director**, appointed by the Administrative Board in consultation with the Commission, leads the agency and is responsible for the implementation of strategic objectives.

Within the broader EU space ecosystem, EUSPA operates in close coordination with the European Commission (as programme manager), and the Council of the EU and European Parliament. It also works with ESA by entrusting it tasks under indirect management.¹²² EUSPA's responsibilities are focused on the user- and market-facing segments of the EU Space Programme, in contrast to ESA's focus on system design and development. Finally, EUSPA supports the EU's external space policy by managing cooperation agreements with non-EU countries and international organisations. For example, EUSPA plays a role in the EU-Switzerland cooperation framework on satellite navigation, and it engages in security coordination with strategic partners to protect space infrastructure against physical and cyber threats.

4.2.3 The European Parliament

The Parliament contributes to shaping EU space policy through its legislative and budgetary powers. It co-decides on space-related regulations and helps shape long-term space policy priorities. **Central to this role is the Committee on Industry, Research and Energy (ITRE), which deals with a range of policy areas, including space policy.** ITRE is responsible for examining legislative proposals from the Commission concerning the EU Space Programme. The committee can propose amendments, request studies, and shape strategic direction through own-initiative reports. For example, it has commissioned studies like the 2021 Space Market report to assess the economic and societal impact of space activities, highlighting the need for greater public awareness and institutional engagement. ITRE also influences broader industrial and digital policies, ensuring that space is embedded within Europe's long-term competitiveness and innovation agendas.

¹²² In line with Article 29(5) of the Space Programme Regulation (Link).



Since February 2025, a **Space Policy Working Group**¹²³ within the ITRE committee was also established.¹²⁴ Its organisational structure consists of between 7 to 8 permanent members nominated by each political group and additional ad hoc ones. On a rotational basis, one of the permanent members will be selected as chair for every meeting.¹²⁵

Parallel to ITRE, the **Committee on Security and Defence (SEDE)**, upgraded from a subcommittee to full committee status starting from 2025,¹²⁶ reflects the evolving strategic importance of space in security policy. SEDE's expanded mandate includes examining space-related security initiatives, such as satellite-based surveillance, early warning systems, and secure communications. The committee's role is critical in aligning

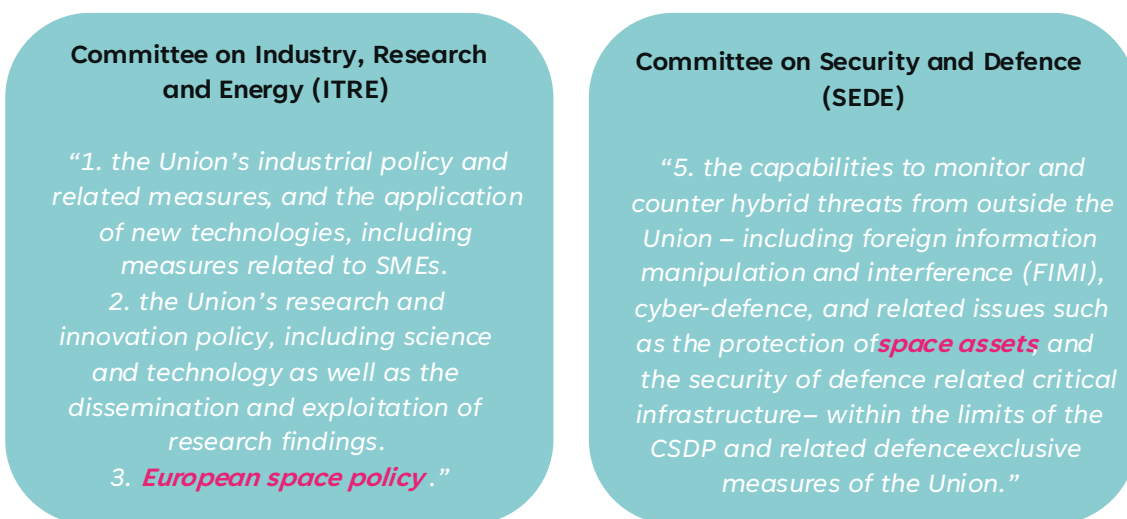


Figure 38: Main EP Committees related to space

space capabilities with the EU's Common Security and Defence Policy (CSDP), focusing on the resilience of critical infrastructure and the protection of space assets. SEDE also monitors global trends in space security and engages with relevant stakeholders, including the European Defence Agency and the EU Satellite Centre.

In supporting these efforts, Political Advisors play an important role. Each political group within the Parliament employs advisors who assist MEPs by providing in-depth analysis on legislative files, offering briefings, and facilitating coordination both within and across committees. On space-related issues, advisors ensure their group's priorities are reflected in amendments, resolutions, and votes. Beyond legislative duties, they act as key liaisons

¹²³ Rule 36 of the Rules of Procedure of the European Parliament (Link)

¹²⁴ Committee on Industry, Research and (ITRE). Minutes - Meeting of 6 March. European Parliament, 6 March 2025 (Link)

¹²⁵ Ibid.

¹²⁶ The body was transformed into a full committee by decision of the European Parliament on 18 December 2024, with effect from 20 January 2025 (Link). In July 2024. At the constitutive meeting of the new full committee on 27 January 2025, Chairs and Vice-Chairs of the fully-fledged SEDE Committee were elected, in line with European Parliament Rules of Procedure (Link)



with external stakeholders, keeping track of developments across EU institutions and ensuring that space policy aligns with broader political objectives.

Alongside formal committee structures, MEPs can engage in intergroups to discuss emerging topics and coordinate efforts across political groups. **The Sky and Space Intergroup (SSI), was created by the Conference of Presidents in 2019,¹²⁷** and serves as an informal forum where MEPs, industry stakeholders, and civil society actors collaborate to keep space high on the European Parliament’s political agenda. While only MEPs can be formal members, the Intergroup’s outreach to the space sector facilitates a strong industry-policy dialogue. Its strategic objectives include:

- Safeguarding the EU Space Programme budget under the Multiannual Financial Framework (MFF) 2021–2027;
- Promoting a demand-driven EU industrial policy for space and addressing challenges related to STM;
- Advancing the integration of space technologies into digital infrastructures, such as telecommunications and AI-driven data services.

Supporting all these activities within the Parliament is the European Parliamentary Research Service (EPRS), which provides independent, evidence-based analysis to inform legislative work on space policy. By producing reports and briefings, EPRS ensures that MEPs and committees are well-equipped to navigate a variety of topics including space. Its work supports the formulation of effective space policies that align with broader EU strategic goals¹²⁸.

4.2.4 The Council of the EU

The Council of the EU discusses and votes on proposals for legislative acts as well as regularly holds public debates on important issues affecting the interests of the EU and its citizens.

Regarding space, the Council of the EU addresses matters of a civilian nature, primarily through the

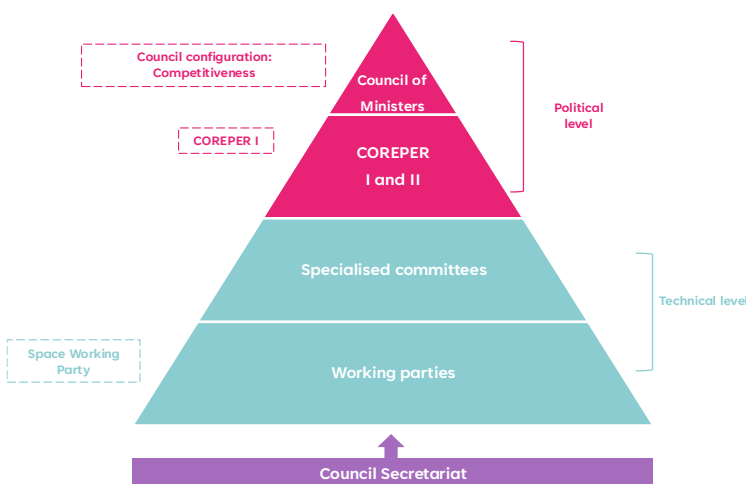


Figure 39: Council of the EU system

¹²⁷ According to Rule 35 of the Rules of Procedure of the European Parliament (Link)

¹²⁸ European Parliament, European Parliamentary Research Service, (Link)



Competitiveness Council (COMPET) configuration.¹²⁹ This configuration deals with four major policy areas: internal market, industry, research, innovation and space. Its objective is to enhance competitiveness and increase growth in the EU. Regarding research, innovation and space, the Council aims to strengthen the scientific and technological base of European industry, thus reinforcing its international competitiveness and driving growth and jobs. In this sense, it also works with ESA to develop space policy.¹³⁰ Ministers responsible for trade, economy, industry, research, innovation, and space are asked to participate to COMPET meetings, depending on the agenda, with relevant Commissioners also attending when appropriate.

The **Working Party on Space** is the Council's dedicated preparatory body for space-related policy and legislative files.¹³¹ Chaired by the Presidency (MS), it supports the strategic and technical coordination of the EU's space agenda, facilitating discussions among the Member States ahead of COMPET Council Conclusions. The Working Party on Space is also tasked with the preparation of statements on behalf of the EU for UN COPUOS sessions. Composed of space attachés based at the Member States' permanent representations and representatives from the capitals, the group meets regularly in Brussels under the chairmanship of the rotating presidency of the Council of the EU. Its remit includes:

- Coordination support of and visibility on the EU's flagship space programmes, including updates on deployment, operational readiness, and governance.
- Legislative and policy developments related to the EU Space policy, including, and programmatic planning under the MFF.
- Consideration of space-related industrial policy, resilience of space infrastructures, and new priorities such as STM, sustainability in orbit, and access to space.
- Engagement on international dimensions of EU space policy, including cooperation with third countries and multilateral fora, and EU positioning on the global space governance agenda.
- Support to the interinstitutional coordination with the European Commission, EUSPA, and ESA.

The Working Party prepares Council conclusions, which frame political guidance on space policy at the EU level. Recent discussions have addressed the increasing securitisation of space, industrial competitiveness, and emerging regulatory frameworks. In line with

¹²⁹ Council of the EU, Competitiveness Council configuration (COMPET) (Link)

¹³⁰ ESA and the EU meet in joint and concomitant sessions called "ESA-EU Space Councils" based on the 2004 Framework Agreement, which aim, among other, at providing high-level orientations for an "efficient and mutually beneficial cooperation" with regard to space activities, 2004 Framework Agreement (Link)

¹³¹ Established in accordance with Article 19.3 of the Council's Rules of Procedure, which allows the Committee of Permanent Representatives (Coreper) to set up working parties to prepare the Council's work (Link)



evolving priorities, the group has been involved in preparatory work for several EU initiatives.¹³²

In addition, the **Foreign Affairs Council (FAC)** configuration defines and implements the EU's foreign and security policy, based on guidelines set by the European Council. It is composed of the foreign ministers of EU Member States. Depending on the agenda, the Council brings together defence ministers (common security and defence policy); development ministers (development cooperation) and trade ministers (common commercial policy). The FAC configuration is involved in space because of responsibilities on the **CSDP**, which is an integral part of the EU's **CFSP**.¹³³

Within the FAC, there are several Working Parties that occasionally handle space security, dual-use, SSA, and defence-related space issues. The **Working Party on Non-Proliferation (CONOP)** promotes the non-proliferation of weapons of mass destruction by coordinating EU positions in international fora and upholding and strengthening all relevant international agreements in this field. It also touches on dual-use items and export controls for sensitive space technologies. CONOP is responsible for the preparation and coordination of EU action relating to CFSP aspects relevant for outer space. **The Working Party on Conventional Arms Exports (COARM)** is relevant when space-related items fall under the EU Common Position — usually satellite components or dual-use technologies. Additionally, the **Working Party on Global Disarmament and Arms Control (CODUN)** covers space arms-control topics (e.g., anti-satellite weapons), space security in multilateral fora (UN, COPUOS). These Working Parties also **collaborate with the Working Party on Space** of the COMPET Council configuration. Unlike in other configurations, meetings of the FAC are usually chaired by the HR/VP, assisted by the EEAS. However, when the FAC discusses common commercial policy issues, it is presided by the representative of the EU Member States holding the presidency of the Council of the EU, like in other configurations.¹³⁴

The preparatory body of the Council responsible for CSFP/CSDP is the **Political and Security Committee (PSC)**, which is chaired by representatives from EEAS, and includes strategic implications of space for EU security.¹³⁵ The **European Union Military Committee (EUMC)**, provides the PSC with advice and recommendations on all military matters within the EU. It is composed of the Chiefs of Defence of the Member States, who are regularly represented by their permanent Military Representatives. The EUMC also oversees the work of the EU Military Staff and plays a key role in guiding military aspects of the CSDP.¹³⁶

¹³² Council of the European Union, Working Party on Space, Related Documents (Link)

¹³³ Council of the European Union, Foreign Affairs Council (FAC), Accessed May 2025 (Link)

¹³⁴ Council of the European Union, Working Party on Non-Proliferation and Arms Exports, Accessed May 2025 (Link)

¹³⁵ Council of the European Union, Political and Security Committee (PSC), Accessed May 2025 (Link)

¹³⁶ The EUMC was set up by Council Decision 2001/79/CFSP of 22 January 2001 (Link)



4.2.5 The European External Action Service

Since 2011, the EEAS carries out the EU’s Common Foreign and Security Policy “to promote peace, prosperity, security, and the interests of Europeans across the globe”.¹³⁷ Its global presence comprises more than 140 delegations across the world, over 5,000 civilian and military personnel deployed in EU Missions and Operations, and a staff composition that relies to significant extent on diplomats of Member States. Within EEAS, space affairs fall under the remit of the Managing Director for **Security and Defence**, who oversees two directorates: the Security and Defence Policy Directorate (SecDefPol) and the Peace, Partnership and Crisis Management Directorate (PCM). A central figure in this structure is the **EU Special Envoy for Space (SES)**, who also serves as the **Head of the Space Division, as well as Head of SecDefPol**.¹³⁸ In this role, the Special Envoy shapes the EEAS’s work on space security, ensuring coherence across diplomatic, defence, and strategic domains. The Special Envoy for Space advises the HR/VP on all space-related issues of EU interest, particularly those involving international, security, and defence dimensions.

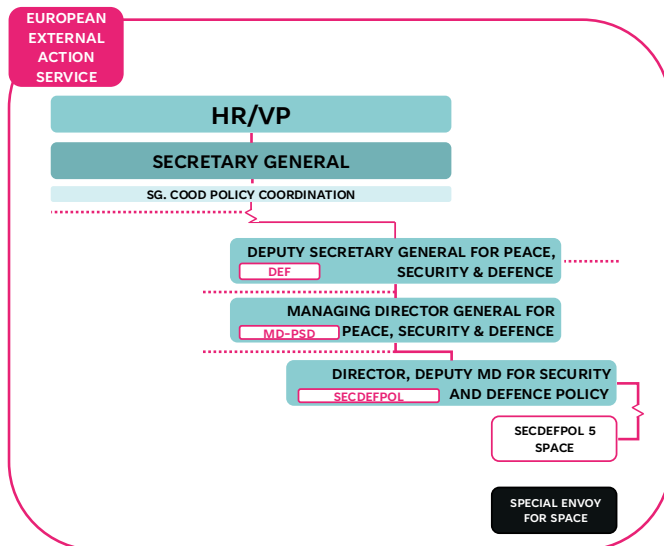


Figure 40: EEAS governance related to space activities

The team of the Special Envoy for Space plays an important role in integrating space policy into the EU’s external action and foreign policy, in particular its Common Security & Defence Policy (CSPD). It facilitates coordination with EU institutions, Member States, and international partners to address space security challenges and promote the EU’s strategic interests in this domain.¹³⁹ This includes leading on space security in bilateral relations with strategic partners such as the US and Japan, with NATO, and in multilateral forums including on PAROS and in COPUOS.

forums including on PAROS and in COPUOS.

The Special Envoy supports the HR/VP in fulfilling her operational duties concerning the EU’s response to threats affecting the systems and services deployed under the EU Space

¹³⁷ European Union External Action. “About the European External Action Service.” EEAS, 1 February 2025 (Link)

¹³⁸ European Union External Action. “Space.” EEAS, 24 January 2024 (Link)

¹³⁹ Ibid.



Programme based on Council Decision 2021/698 (CFSP)¹⁴⁰ by implementing the 24/7 Space Threat Response Architecture (STRA), in cooperation with Council and GSMC. In this context, it regularly conducts the Space Threat Response Architecture Exercise (STRA-X) to assess the EU's readiness to detect, and respond effectively to attacks on its space assets, in cooperation with the Galileo Security Monitoring Centre (EUSPA), Council, EU Member States, including in PSC formation. Moreover, the Special Envoy supports the HR/VP in the functioning of the EU Satellite Centre (SatCen), both in operational direction and as Chair of the SatCen Board as the HR/VP's representative.

Within EEAS, the **EU Military Staff (EUMS)**, operating under the authority of the HR/VP and guided by the EU Military Committee (EUMC), provides military expertise and assessment. EUMS contributes to strategic planning and supports the EEAS in the implementation of the CSDP, including the use of space assets in support of EU missions and operations.¹⁴¹

Importantly, **EEAS's role in space governance was further strengthened by the EU Space Strategy for Security and Defence (EUSSSD)**, jointly adopted by the HR/VP and the Commission in 2023. The strategy identifies space as a strategic domain and entrusts the EEAS with key responsibilities, including space threat response, strengthening international partnerships, and enhancing diplomatic efforts in multilateral forums. Together with the European Commission and the EDA, the EEAS is tasked with five key areas: shared understanding of space threats; resilience and protection of space systems and services in the EU; responding to space threats; use of space for security and defence; and partnering for responsible behaviours in space.¹⁴²

In this context, the EEAS acts as the Union's principal interface for international engagement on space security, ensuring consistency between the EU's diplomatic action and the strategic use of space assets for defence and crisis management, in close cooperation with Member States.

¹⁴⁰ Council Decision (CFSP) 2021/698 of 30 April 2021 on the security of systems and services deployed, operated and used under the Union Space Programme which may affect the security of the Union, April 2021, (link)

¹⁴¹ European Union External Action. "European Union Military Staff." EEAS, 24 January 2022 (Link)

¹⁴² EEAS, "EU Space Strategy for Security and Defence", April 2023 (Link)(Link)



4.2.6 European Defence Agency

The EDA is an intergovernmental agency of the Council of the EU that promotes and facilitates integration and support of Member States in their effort to improve European defence capabilities. It is the main stakeholder when considering synergies in the field of space and defence, and it sustains the EU's CSDP. As such, it can be a useful interface between national defence institutions and other non-defence institutions, such as EEAS, the Council, or the Crisis Management and Planning Directorate (CMPD).¹⁴³ Acting as an enabler and facilitator for Ministries of Defence (MoDs) willing to engage in collaborative capability projects, the Agency has become the central hub for European defence cooperation.

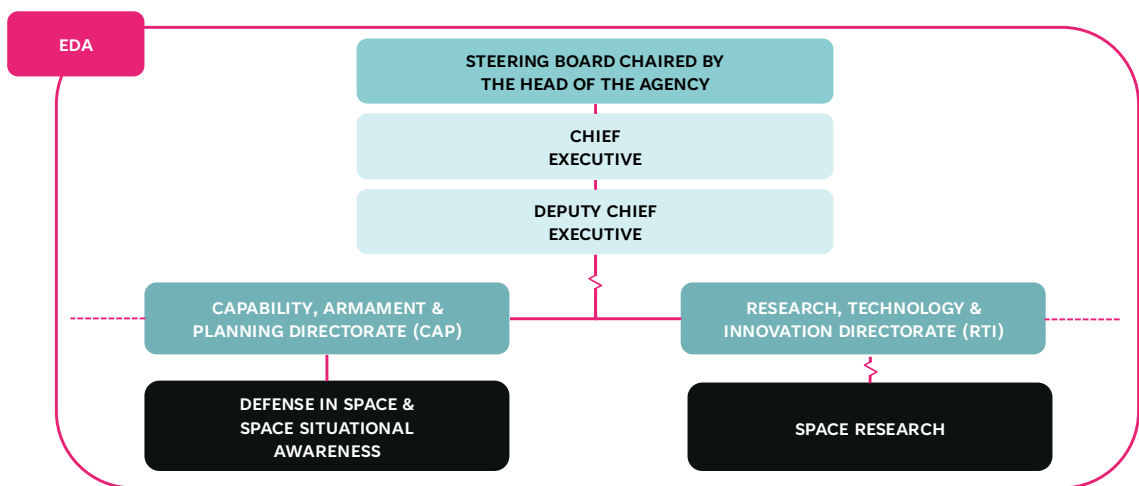


Figure 41: EDA governance related to space

In May 2024, EU Defence Ministers approved a reinforced mandate for the EDA, expanding its main tasks from three to five. The Agency's core tasks include dedicated responsibilities for (1) identifying shared needs and priorities at EU level; (2) enabling collaborative defence research, technology, and innovation; (3) harmonising requirements and engaging in joint capability development; (4) aggregating demand towards joint procurement; and (5) interfacing with EU civilian and defence policies, voicing Ministries of Defence's joint positions.¹⁴⁴ Space-related activities within the EDA are managed through a cross-directorate approach that notably involves the Industry, Synergies and Enablers (ISE) and Capabilities, Armament & Planning (CAP) directorates. These activities encompass a range of critical domains, such as intelligence, surveillance and reconnaissance (ISR); satellite communications (SATCOM); space-based EO (SBEO); space situational awareness (SSA); access to space; protection of space assets; positioning, navigation, and timing (PNT);

¹⁴³ European Defence Agency. "Mission." (Link)

¹⁴⁴ European Defence Agency. "Latest News. EU Defence Ministers approve reinforced mandate for EDA." (Link)



critical space technologies aimed at achieving European non-dependence; and cybersecurity in space operations.

Since 2008, the EDA has been responsible for producing the Capability Development Plan (CDP), a comprehensive planning tool that guides Member States in identifying priorities and opportunities for defence cooperation. The CDP provides a detailed assessment of the EU's long-term capability needs, supporting the development of collaborative projects and ensuring that investments are coordinated to maximise effectiveness and reduce duplication. Developed with close input from Member States, the EU Military Committee, and the EU Military Staff, the CDP highlights key areas where space capabilities can enhance defence performance and strengthen the EU's overall security and defence posture.

Since 2017, EDA has also conducted the **Coordinated Annual Review on Defence (CARD)**, which provides an overview of the EU defence landscape and promotes collaboration by pointing out collaborative opportunities. The 2024 CARD report, created by the EDA alongside the European External Action Service (EEAS) and the EU Military Staff (EUMS), underscores that increased spending alone cannot adequately prepare the EU for modern threats. On space, the 2024 CARD report called for EU Member States to increase their engagements in Space Situational Awareness (SSA) and satellite communications, deemed to be critical investment areas. SSA and space-based capabilities were more generally identified as strategic enablers where collaborative efforts would be particularly beneficial, and that have so far seen only limited progress.

On the research and technology side, CARD prioritisation is increasingly implemented through EDA's **Overarching Strategic Research Agenda (OSRA)**, which structures collaborative defence R&T via "Technology Building Blocks" (TBBs) and associated roadmaps. Within EDA's Capability Technology Area (CapTech) for Space, this pipeline has translated into concrete EDA-led projects, including projects such as **LEO2VLEO** (a military crisis-response constellation demonstrating manoeuvrability between LEO and VLEO) and **VLEO-DEF** (developing a VLEO satellite concept tailored to defence ISR needs)¹⁴⁵

There are several different EDA working bodies related to space, for example the Defence in Space (DiS) Forum, also known as Capability Planners Group Space, in the CAP Directorate. It was created following the first CARD cycle in 2020, which identified Defence in Space as a focus area for urgent and promising collaboration among EU defence stakeholders. Established by the EDA Steering Board, the DiS Forum works to develop a common European approach to defence capabilities in space, increase collaboration

¹⁴⁵ European Defence Fund, Indicative multiannual perspective 2025-2027 (link)



among Member States, and shape common defence perspectives on EU initiatives, including EU civilian space programmes.

The CapTech Space, located in RTI, addresses EU technological gaps related to space in support of defence capabilities by steering R&T development for space defence. CapTech Space comprises a very broad community with more than 450 representatives from 23 participating Member States, industry and academia to support the cooperation and skills development for space defence.

Expressing MoDs joint positions, EDA contributes military requirements to several EU Commission space initiatives and participates as an expert in dedicated working groups. EDA and the Commission's DG DEFIS do not have any formalised cooperation framework. Nonetheless, EDA and the Commission's cooperation relationship is promoted for example in space instruments (EU Space Programme Regulation) and strategic documents (such as the Joint Communications on an EU approach for Space Traffic Management and on the EU Space Strategy for Security and Defence). Despite these continuous efforts, it is worth noting that the defence dimension is sometimes not systematically or satisfactorily represented in some of these initiatives.

With regard to other institutional partnerships, **since 2011 the EDA has maintained a formal cooperation agreement with ESA**. This Administrative Arrangement enhances joint efforts to develop space technologies for defence and boosts the EU's overall capacity to address security challenges in space.¹⁴⁶ Furthermore, **the EDA and SatCen have cooperated since 2004 and** formalised their cooperation through an exchange of letters in 2016, to promote closer collaboration and enhance space-related intelligence and security capabilities, enabling more effective use of satellite imagery and geospatial information to support EU defence and crisis management operations.¹⁴⁷

4.2.7 European Union Satellite Centre

SatCen (previously EUSC) is an EU agency that supports decision-making in the field of the Common Foreign and Security Policy (CFSP), including crisis management missions and operations. It provides products and services derived from the exploitation of relevant space assets and collateral data, including satellite and aerial imagery. SatCen is headquartered at Torrejón Air base, near Madrid, Spain.¹⁴⁸

SatCen plays an important role in the EU space landscape by delivering geospatial intelligence products and services that inform and support the EU's security and defence policies. Its products enable enhanced situational awareness for EU decision-makers,

¹⁴⁶ Administrative Arrangement between EDA and ESA, June 2011 (Link)

¹⁴⁷ European Defence Agency, EDA and EU Satellite Centre (SATCEN) formalize cooperation with exchange of letters (Link)

¹⁴⁸ Council Joint Action 2001/264/CFSP of 27 March 2001 establishing the EU Satellite Centre, Official Journal L 085 (Link)



particularly in crisis management and Common Security and Defence Policy (CSDP) operations. The agency's primary users include the Council, EEAS, EU Member States, the Commission, and other EU agencies such as Frontex and EMSA. SatCen has historically provided support to third countries and international organisations, including the UN, the

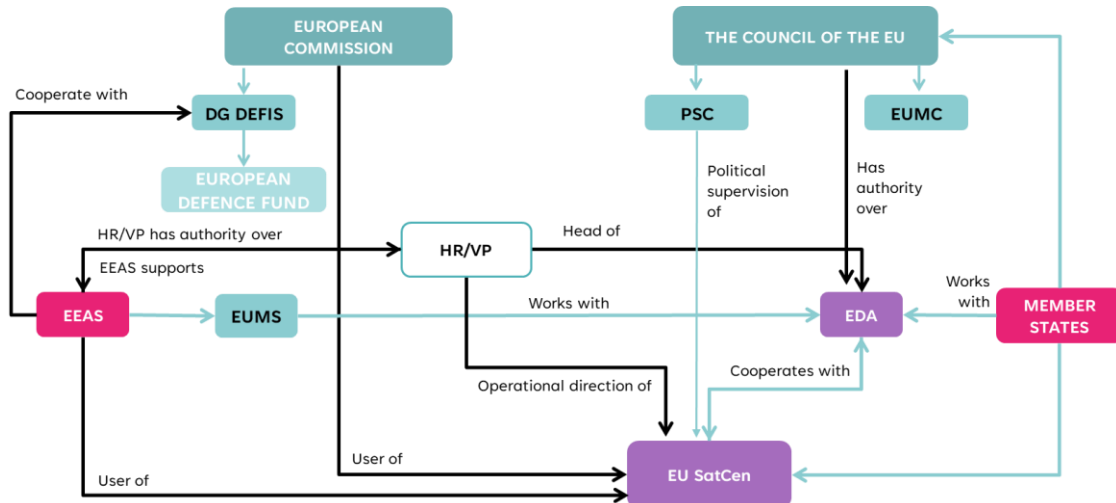


Figure 42: The EU's security and defence framework

Organisation for the Prohibition of Chemical Weapons (OPCW) and the Organization for Security and Co-operation in Europe (OSCE). Collaboration is central to SatCen's effectiveness. It cooperates closely with EDA, the Commission, and ESA to align efforts in the development and use of space-based capabilities. Through these efforts, SatCen strengthens the EU's strategic autonomy and resilience.¹⁴⁹

¹⁴⁹ SatCen, "Missions, users and partners" (Link)



4.3 EU space policies, strategies and laws

In addition to the Member States' space policy, the EU has established a political framework for space activities necessary to meet key societal challenges, provide for industrial growth, and ensure EU autonomy.

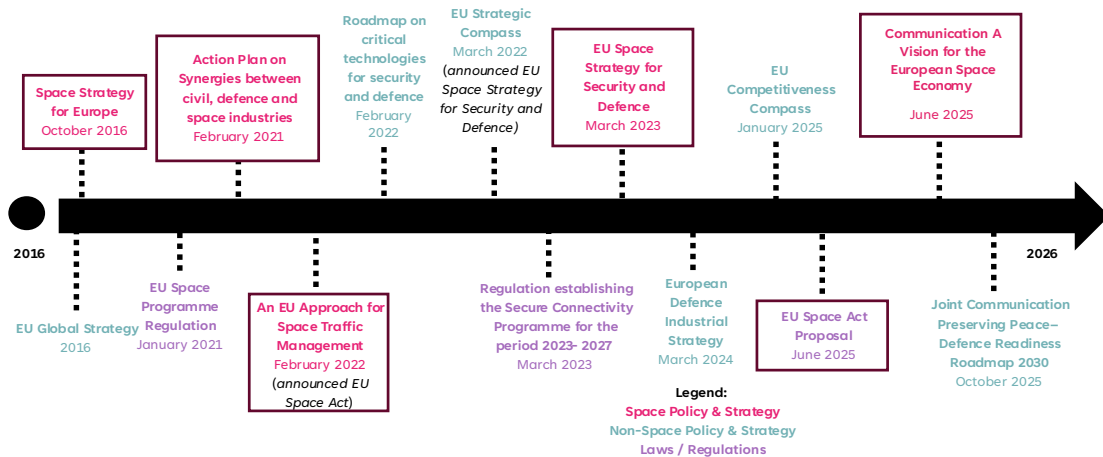


Figure 43: The EU's strategy and policy framework

4.3.1 EU executive strategic documents

The Commission communicates its vision for space through policy documents, strategies, and action plans, emphasising the critical role of space in supporting EU priorities such as the Green Deal, digital transformation, security, and global competitiveness.

A list of space policies, strategies and actional plans from 2016 onwards is presented below:

- **The Space Strategy for Europe (October 2016, Commission)** sets the EU's overarching space policy priorities around socio-economic benefits, competitiveness/innovation, autonomous access to space (notably launchers), and international cooperation. It functions as a strategic framing document rather than a governance instrument, orienting EU programmes and market-support measures.¹⁵⁰
- **The Action Plan on Synergies between Civil, Defence and Space Industries (February 2021, Commission)** seeks to strengthen Europe's technological edge by boosting cross-programme synergies, valorising R&D spin-offs, and enabling "spin-ins" from civil industry into defence/space. It links implementation to EU funding tools (notably the European Defence Fund) and flags follow-up actions with biennial Commission progress reporting.¹⁵¹

¹⁵⁰ European Commission, *Space Strategy for Europe* (European Union, October 2016), (Link)

¹⁵¹ European Commission, *Action Plan on synergies between civil, defence and space industries*, February 2021, (Link)



- **An EU Approach for Space Traffic Management (February 2022, Commission, HR/VP and EEAS)** presents the EU’s policy line on STM, centred on improving SST services, promoting data-sharing, and developing operational standards to reduce collision risk. It also positions the EU as a norm setter through international cooperation on STM¹⁵²
- **The EU Space Strategy for Security and Defence (March 2023, HR/VP, EEAS and Commission)** frames space as a contested domain and prioritises resilience and protection of EU space assets, deterrence/response coordination, and strategic autonomy. It complements the civil space agenda by embedding security objectives and advocating international norms for responsible behaviour.¹⁵³
- **The Vision for the European Space Economy (June 2025, Commission)** articulates a long-term (to 2050) economic integration agenda for space, structured around six “building blocks” (single market, R&I, industrial readiness/non-dependence, commercialisation/finance, cooperation, skills). It also introduces “Space Team Europe” as a high-level coordination forum for ecosystem stakeholders.¹⁵⁴

2024: a year of political guidance through high-level reports

2024 was a prolific year for the EU in terms of forward-looking thinking. At the Commission’s request, four European politicians and their teams penned expert reports with



Letta Report
April 2024



Draghi Report
September 2024



Heitor Report
October 2024



Niinistö Report
October 2024

recommendations for the future of the Single Market; European competitiveness; EU research, technology and innovation; and civilian and military preparedness. The reports include both explicit suggestions for the space sector and broader reforms that would be relevant for European pursuits in space.

In June 2023, the European Council called for “an independent High-Level Report on the future of the Single Market” to be drafted and presented at the Council’s March 2024 meeting. The Council and the Commission tapped Enrico Letta — Italy’s former Prime Minister — to produce the report, which was ultimately published in April

¹⁵² European Commission, “An EU Approach for Space Traffic Management An EU contribution addressing a global challenge,” 15 Feb. 2022, (Link)

¹⁵³ European Commission, *European Union Space Strategy for Security and Defence*, March 10, 2023, (Link)

¹⁵⁴ European Commission, *A vision for the European Space Economy*, June 2025, (Link)



2024.¹⁵⁵ The **Letta Report** contains several proposals that, if implemented, would affect the EU's space sector, such as: 1) **Revision of space funding vehicles and advancement of private capital involvement in the sector**. The Report contended that the European space sector's traditional reliance on public funding and the geo-return policy is “no longer adequate for today's global, competitive space economy”; 2) **The creation of an EU-wide state aid mechanism to improve industrial competitiveness**. The mechanism could unlock further support for the space sector by modifying existing restrictions that limit government investments; 3) **The creation of a specialised stock exchange to improve funding access for deep-tech start-ups**. The exchange could provide more financial opportunities for the space sector.

In September 2023, the European Commission tapped Mario Draghi — the former Italian prime minister and European Central Bank president — to pen a report on the future of European competitiveness. The **Draghi Report**, published in September 2024, dedicates an entire chapter to space.¹⁵⁶ **Draghi identified several root causes for the EU's lack of competitiveness in the sector**, such as lower public funding for space policy than in peer countries, lacking investment coordination among Member States, limited coordination between space and defence, and international dependency on foreign producers. Like the Letta Report, this Report suggested that ESA's geo-return principle might contribute to the fragmentation of the space sector in the EU. The **Report suggests various regulatory reforms**, such as establishing a Single Market for space, reforming the EU's space governance framework, and establishing a dedicated EU Space Fund. It also suggested that the EU should improve access to finance for its private space enterprises, that ESA should do away with its geo-return rule, and that the EU should ensure autonomous access to space.

4.3.2 Council conclusions

The Council of the EU has long played a crucial role in the evolution of European space pursuits. Through the Conclusions of its Competitiveness Council in particular, the Council can impact space priorities by suggesting enhancements to existing capabilities and proposing new ones. Over the course of the EU Space Programme for 2021-2027 so far, we have seen several presidencies release space-related Conclusions on topics ranging from utilising space to protect people in coastal areas to space usage for security and defence purposes.¹⁵⁷

¹⁵⁵ Enrico Letta, “Much More than a Market” *European Commission*. , August 2024, (Link)

¹⁵⁶ Draghi Mario, “The Future of European Competitiveness: Part B | In-Depth Analysis and Recommendations,” *European Commission*, September 9, 2024, (Link), pp. 172-186

¹⁵⁷ Council of the EU, “Timeline: EU space policy,” 23 May 2025, (Link)



A closer look at the conclusions reveals several broad topics of discussion, including current programme analysis, improvements, and enhancements; recommendations for the development of new programmes; discussions of cross-fertilisation between the Space Programme and other domains and industries; and uptake of space data and services. Within these broad topics, priorities differ based on the Presidency and the political climate, but in the last three years, priorities have mostly focused on one of the two nexuses between existing space programmes and transversal priorities: a nexus between environmental priorities and Copernicus uses for their ends, and a nexus between security priorities and the uses of SSA tools for their achievements. The conclusions have been supported by targeted exchanges on similar topics, such as the exchange of views on “The Future of the EU’s Space Policy – Defence Synergies with a Civilian Space Programme” held in November 2024 during the Hungarian Presidency.

Portuguese Presidency (January-June 2021)	<ul style="list-style-type: none">• Space for people in coastal areas (28 May 2021)• New space for people (28 May 2021)
Slovenian Presidency (July-December 2021)	<ul style="list-style-type: none">• Space for everyone (26 November 2021)
French Presidency (January-June 2022)	<ul style="list-style-type: none">• EU Approach to Space Traffic Management (10 June 2022)• Copernicus by 2035 (10 June 2022)
Czech Presidency (July - December 2022)	<ul style="list-style-type: none">• No relevant Council Conclusions were published.
Swedish Presidency (January- June 2023)	<ul style="list-style-type: none">• Fair and sustainable use of space (23 May 2023)
Spanish Presidency (July-December 2023)	<ul style="list-style-type: none">• On the EU Space Strategy for Security and Defence (13 November 2023)• Space traffic management: state of play (8 December 2023)
Belgian Presidency (January-June 2024)	<ul style="list-style-type: none">• Strengthening Europe’s competitiveness through space (23 May 2024)
Hungarian Presidency (July - December 2024)	<ul style="list-style-type: none">• Reinforcing European competencies in the space sector (29 November 2024)• The interim evaluation of the European Union's Space Programme (29 November 2024)
Polish Presidency (January - June 2025)	<ul style="list-style-type: none">• On the use of satellite data, in particular from Earth observation constellations, for civilian protection and crisis management (23 May 2025)

Figure 44: A list of Council conclusions on space-related topics.

Under the Danish Presidency (July-December 2025) and subsequently the Cypriot Presidency (January-June 2026), no Council conclusions were adopted; Council discussions under the space working party are limited to the regulation of the EUSPA Regulation and the EU Space Act.



4.3.3 EU space policy for security and defence

The EU has increasingly recognised space as a vital component of its security and defence ambitions, shifting its role from a primarily **economic** and **environmental** domain to a strategic asset essential for resilience and strategic autonomy. Main stakeholders dealing with space security are the **European Commission**, the Council, the European External Action Service (EEAS), the European Defence Agency (EDA), the European Union Satellite Centre (SatCen), and EUSPA working together to strengthen the Union's defence capabilities through space-related initiatives.

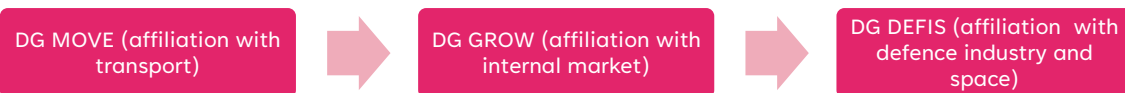


Figure 45: Evolution of space portfolio under the European Commission relevant DGs

The legal foundations for the EU's collective defence framework were laid with the TFEU, Section 2, PROVISIONS ON THE COMMON SECURITY AND DEFENCE POLICY (Lisbon Treaty, Article 42(7)), which introduced the mutual assistance clause to enhance cooperation in defence matters among Member States, increasing cooperation in the European defence matters. This, in turn, led to the establishment of Permanent Structured Cooperation (PESCO) and EU Battlegroups. The European Security and Defence Policy (ESDP) was transformed into the Common Security and Defence Policy (CSDP), which is the main component of the EU's Common and Foreign Security Policy (CFSP). In 2016, the **EU Global Strategy**¹⁵⁸ emphasised the importance of protecting space-based services, promoting autonomy in space access, and strengthening links between defence, foreign policy, and space. The Strategy also stressed the need to better link CFSP/CSDP with policies covering the internal market, industry and space.

The **European Defence Action Plan (EDAP)**¹⁵⁹ furthered these goals by proposing the European Defence Fund (EDF) to support joint defence capabilities, with a focus on enhancing security through technological innovation and cross-border defence cooperation. Resulting from the EDAP in 2017, the European Commission launched its proposal for the EDF to be implemented by the European Defence Research Programme and the European Defence Industrial Development Plan (EDIDP). In parallel, Copernicus Security services provide operational EO-based support for **border surveillance** (implemented with **Frontex**) and **maritime surveillance** (implemented with **EMSA**), while the **Copernicus Security Service component on Support to EU External and Security Actions (SESA)**, implemented with **SatCen**, delivers tailored geospatial intelligence products to meet EEAS/CFSP/CSDP user need. The European Commission is also working with EEAS and

¹⁵⁸ Shared vision, common action: a stronger Europe — A global strategy for the EU's foreign and security policy, 2016 (Link)

¹⁵⁹ Communication (COM(2016) 950 final) – European Defence Action Plan, November 2016 (Link)



SatCen on additional services, in response to CFSP/CSDP user needs. After the introduction of SSA in 2011, a set of civilian-military SSA user requirements were included in the European Commission Staff Working Paper endorsed by EU Member States in the Political Security Committee (PSC) of the Council in the same year. In the frame of Space Surveillance and Tracking (SST), the EU then adopted a Decision to establish an SST Support Framework (later subsumed in Regulation 2021/696), which was initially responsibility of SatCen and lately transferred to EUSPA. Subsequently, the PSC adopted High Level Civil Military User Needs for Governmental Satellite Communications (GOVSATCOM) in March 2017.

In 2022, the **Strategic Compass** recognised outer space as an increasingly contested domain and set the goal of developing a stronger, more coherent European security and defence framework by 2030, and called for a space strategy for security and defence.¹⁶⁰ In 2023, the **EU Space Strategy for Security and Defence** was proposed by the HR/VP,¹⁶¹ marking a step in integrating space into the EU's security and defence policies, with the aim to foster a shared understanding and response to space threats, strengthen the resilience and protection of space systems and services, maximise the use of space for security and defence purposes, and strengthen its partnerships and promote responsible behaviour in outer space. The **White Paper for European Defence – Readiness 2030**, published in 2025,¹⁶² highlighted space as a critical capability for future defence readiness, stressing the need for long-term investments in secure satellite communications and EO to reduce dependency on external providers. This is part of the EU's broader ambition to develop a European Defence Union, where space helps to achieve operational readiness and strategic independence. Building on this White Paper, the Commission President Ursula von der Leyen unveiled the ReArm Europe Plan/Readiness 2030 in March 2025 as a strategic proposal to boost European defence spending through various financial mechanisms. Together, these initiatives aim to reinforce the EU's defence industrial base and enhance collective preparedness. Finally, the **Joint Communication on Preserving Peace – Defence Readiness Roadmap 2030** translates the White Paper on Defence Readiness and the guidance of the European Council into a concrete implementation framework.¹⁶³ The Communication establishes milestones, indicators, and flagship initiatives to strengthen Europe's collective capacity to deter and respond to threats, with an emphasis on the strategic and technological enablers of modern warfare. Within this framework, the document introduces the proposal for a European Space Shield, a pan-

¹⁶⁰ A Strategic Compass for Security and Defence - For a European Union that protects its citizens, values and interests and contributes to international peace and security, March 2022 (Link)

¹⁶¹ Joint Communication to the European Parliament and the Council – EU Space Strategy for Security and Defence, Mar 2023 (Link)

¹⁶² Joint White Paper for European Defence Readiness 2030, March 2025 (Link)

¹⁶³ Joint Communication to the European Parliament, the European Council and the Council/Preserving Peace - Defence Readiness Roadmap 2030, October 2025 (Link)



European flagship designed to enhance the protection and resilience of European space assets and services. The roadmap underscores the dual-use dimension of space technologies and their role in enabling surveillance, communications, and precision operations, while mobilising substantial public and private investments through EU funding instruments and linking them to the broader European Defence Technological and Industrial Base (EDTIB) and the Security Action for Europe (SAFE) and European Defence Investment Programme (EDIP) instruments.

4.3.4 EU Space Act

In the 2023 Commission President von der Leyen's State of the Union, the need to boost industrial competitiveness and the strength of the single market is stated. Among the key priorities for 2024, the letter includes a **proposal for EU Space Law**.¹⁶⁴ The EU Legislative action currently under development finds its roots in the European Commission -HR/VP Joint Communication on an EU Approach for STM (February 2022), where a legislative proposal covering STM rules was proposed. The European Commission-HR/VP Joint Communication on EU Space Strategy for Security and Defence (March 2023) expanded the perceived scope of the legislative action. The proposal is currently discussed by the co-legislators, and thus may still undergo substantive changes.

The Regulation was designed to establish a single rulebook for space activities across the EU and to foster a cohesive internal market for space services. Despite opposition from several countries favouring a more flexible directive, the Commission chose a regulation as a binding and directly applicable instrument relying on Article 114 of the TFEU as a legal basis. The Proposed Act comprises **119 articles, ten annexes and two impact assessment reports**, and is scheduled to take effect from 1 January 2030, with a two-year transition period. Its overarching objective is to “lay down rules for the establishment and functioning of the internal market of space-based data and space services” while aiming at “achieving a high common level of safety, resilience and environmental sustainability” and promoting the EU's global leadership in responsible space governance.¹⁶⁵

The proposal is situated within a broader competitiveness and single market agenda referenced in the 2023 Commission President von der Leyen's State of the Union and was anticipated by both the Draghi and Letta reports.¹⁶⁶ The proposal identifies significant challenges for space actors in navigating national requirements, the cross-border nature of licensing responsibilities, and the resulting bureaucratic hurdles that can squeeze out

¹⁶⁴ “Towards a More Resilient, Competitive and Sustainable Europe,” European Commission, 27, 2023, (Link)

¹⁶⁵ European Commission, Proposal for a Regulation on the safety, resilience and sustainability of space activities in the Union, June 2025, (Link)



SMEs and contribute to an uneven playing field dominated by actors able to absorb compliance costs. While it is true that 13 EU Member states have their own space-related legislation it is hard to find substantial evidence of the fragmentation of the European space market and it is unclear whether the Space Act in its current version will address these issues.

The decision-making process for the EU Space Act follows the ordinary legislature procedure. At the European Parliament, the file has been assigned to ITRE as lead committee, with associated committee input expected from TRAN, IMCO and LIBE. Elena Donazzan (ECR) was appointed as rapporteur of the file, with a plenary vote expected by late-Q1 of 2026. Following the vote, the trilogues between the Commission, the Council, and the European Parliament will take place. Once the institutions reach agreement, the Regulation could be published in the Official Journal of the European Union, anticipated in early-2028 and to enter into force shortly thereafter, with full application expected by 2030 following the two-year transition. Implementation will depend on delegated and implementing acts: delegated acts adopted by the Commission would specify and adapt technical elements (including safety standards, cybersecurity protocols and sustainability criteria) to reflect technological developments and international standards, while implementing acts governed by comitology would ensure uniform application across Member States through binding rules on registration, information exchange, and equivalence recognition for third-country operators. In relation to ESA, the Commission is expected to conclude a dedicated international agreement to ensure continuity with existing governance mechanisms and applicability of the act.



4.4 EU Space Programme

The EU is an important player in space applications, notably through its flagship programmes Galileo and EGNOS, Copernicus, SSA, GOVSATCOM and IRIS². These initiatives

the implementation of the Programme, including the determination of priorities and long-term evolution;	the management of the Programme's components or sub-components that are not entrusted to another entity;	the definition of a clear division of tasks and responsibilities between the various entities involved in the Programme and the coordination of their activities;	the determination of technical and operational requirements needed for the implementation and evolution of the relevant Programme's components (after having consulted users);
the promotion to the public and private sectors for the uptake and use of data and services provided by the Programme's components;	the development of appropriate synergies between the applications of the Programme's various components and for ensuring complementarity, consistency, synergies and links between the Programme and other Union actions and programmes;	the coherence of Programme's activities with other activities in the space domain conducted at the EU, national or international level;	the encouragement of cooperation between the Member States.

Figure 46: Overview of Commission responsibilities under Regulation 2021/696

are improving environmental monitoring, navigation and communications, with a significant impact on daily life and economic growth in the region. Leveraging its competences and the progress of its flagship programmes, the Commission published in 2018 a legislative proposal for a regulation establishing the EU's first-ever unified space programme. Following the complex negotiation process prolonged by the challenges posed by Brexit, the regulation was adopted as Regulation 2021/696, giving way to a single EU Space Programme and establishing EUSPA.¹⁶⁷

In 2023, the Regulation 2023/588 establishes the Union Secure Connectivity Programme for the remainder of the MFF 2021-2027 period (2023-2027). Under the 2021 FPPA, ESA is entrusted with implementing large portions of the EU Space Programme.

Under the Regulation 2021/696, the objectives of the EU Space Programme include:

- Ensuring continuous provision of high-quality, up-to-date, and secure space-related data, information, and services, aiming for global coverage whenever possible.
- Maximising socio-economic impacts by fostering competitiveness and innovation of the industrial value chain with special focus on market uptake and SMEs/start-ups while ensuring synergy and complementarity with the Horizon Europe programme.
- Enhancing the safety and security of the EU and Member States.
- Reinforcing the EU's autonomy, particularly in terms of technology.

¹⁶⁷ Regulation (EU) 2021/696 establishing the Union Space Programme and the EU Agency for the Space Programme (Link)



- Promoting the EU's role in the global space sector, encouraging international cooperation, reinforcing EU space diplomacy and strengthening its role in tackling global challenges.

Decision-making process for the EU Space Programme

The EU Space Programme is governed by a dedicated legal framework, Regulation (EU) 2021/696, which establishes the rules for financing and delivering the Union's flagship space services within the 2021–2027 MFF.¹⁶⁸ The legislative process began with the Commission submitting a draft Regulation to be adopted under the ordinary legislative procedure. The proposal was accompanied by an Impact Assessment and a detailed programme roadmap. It was discussed in second half of 2018 both in the Council and European Parliament following trilogues in first half of the 2019. As the discussion on Brexit and MMF were continuing, provisions related to budget and association of the third countries were bracketed and negotiated only in the second half of 2020 after the agreement on MMF and on EU-UK Trade Cooperation Agreement was reached.

In line with Article 102 of Regulation 2021/696, the Commission was required to carry out an interim evaluation by 30 June 2024, and every four years thereafter. This evaluation examined the performance of the services provided, the evolution of user needs, and the cost-benefit impact of potential changes to programme components. The findings were submitted to the European Parliament, the Council, the European

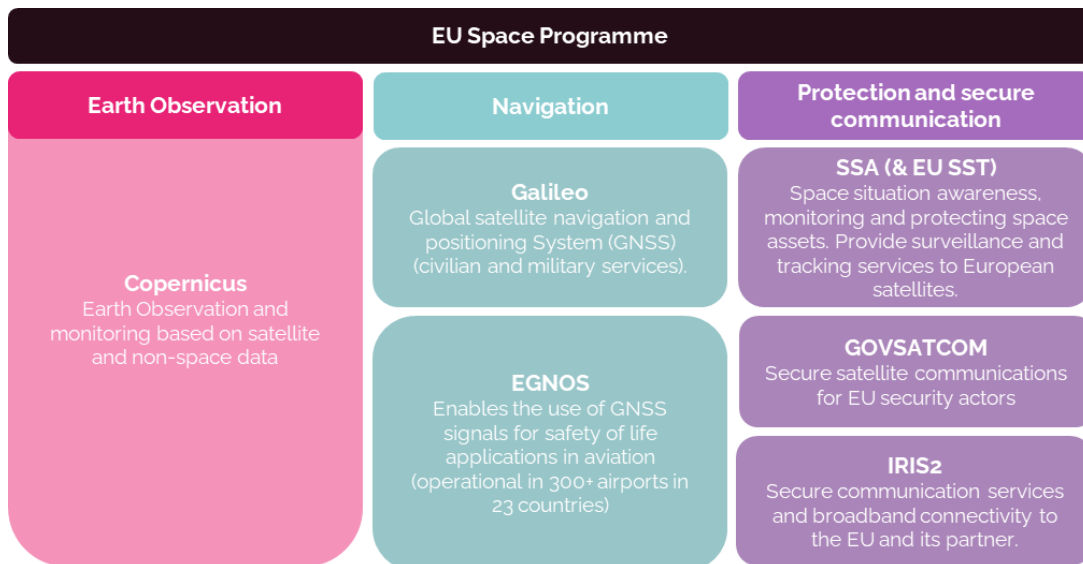


Figure 47: Overview of the current EU Space Programme (at large)

¹⁶⁸ European Parliament and Council of the EU, "REGULATION 2021/696 establishing the Union Space Programme (Link)



Economic and Social Committee, and the Committee of the Regions, potentially accompanied by legislative proposals aimed at adapting the Programme.¹⁶⁹ The Commission's report on the evaluation and the accompanying Staff Working Document (SWD) praised single programme component and EUSPA for mostly achieving and overachieving" their objectives. The evaluation contended that the economic value derived from the Programme far outweighed its costs. Implementation delays were attributed mostly to outside factors and not to the component's management –for example, the delays in launching Sentinel 1C were attributed to “the unavailability of European launchers” and the impossibility of using Russia's Soyuz launchers due to its invasion of Ukraine.¹⁷⁰

Once adopted, the Programme was implemented through a multi-level governance model. The European Commission retains political responsibility and budgetary oversight, ensuring strategic alignment with EU priorities. Operational responsibility is delegated to key implementing bodies: EUSPA manages the operational delivery of Galileo and EGNOS, fosters user uptake, and promotes market development; ESA and other entrusted entities such as EUMETSAT contribute technical expertise in design, development, and procurement activities specific to each programme component. The Programme's budget is set within the framework of the EU's MFF.

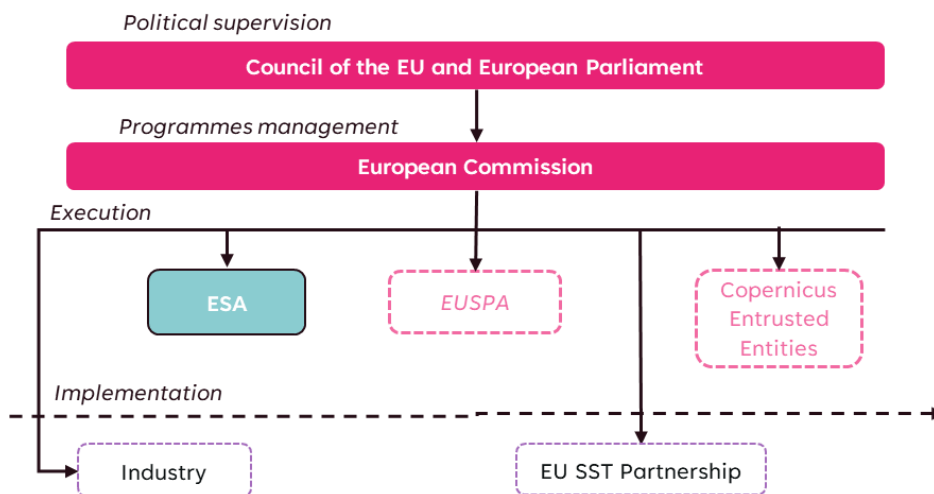


Figure 48: EU Space Programme governance

¹⁶⁹ This process did not concern Space Security Policy, which handled via HR/VP and EEAS with Member States, through the channels of the Common Security & Defence Policy.

¹⁷⁰ European Commission, “COMMISSION STAFF WORKING DOCUMENT EVALUATION Accompanying the Document REPORT from the COMMISSION to the EUROPEAN PARLIAMENT, the COUNCIL, the EUROPEAN ECONOMIC and SOCIAL COMMITTEE and the COMMITTEE of the REGIONS on the Implementation of the EU Space Programme and on the Performance of the European Union Agency for the Space Programme,” July 10, 2024, (Link)



Programme-level oversight is supported by the Programme Committee, composed of Member State representatives and chaired by the Commission. Operating under comitology rules, the Committee adopts work programmes and delivers opinions on the implementation of the Programme, technical specifications, and procurement strategies.

The Space Programme Committees support the governance and implementation of the EU Space Programme through a set of specialised configurations covering its main components and cross-cutting aspects. Dedicated configurations oversee individual programme components, including (a) Galileo and EGNOS for satellite navigation services; (b) Copernicus; (c) SSA, which covers Space Surveillance and Tracking (SST), Space Weather (SWE), and Near-Earth Objects (NEO); (d) GOVSATCOM for secure governmental communications; and (e) Security. Copernicus is supported by the Copernicus User Forum to ensure user engagement and uptake. The (f) **Horizontal configuration** addresses overarching strategic, financial, and coordination issues, while the Security configuration focuses on security-related matters across the programme.

Depending on the subject at hand, the Space Programme Committees can follow either an advisory or an examination procedure for adopting their decisions.¹⁷¹ The examination procedure applies when the decision deals with "implementing acts of general scope" or implementing acts related to "programmes with substantial implications" and "security and safety", among others. In other instances, the advisory procedure applies.¹⁷² If an examination Space Programme Committee makes a positive or negative decision with a qualified majority, the decision is binding for the Commission unless it appeals. On the other hand, an advisory procedure requires only a simple majority for a decision, but such a decision is not binding for the Commission.¹⁷³

In addition to the **Space Programme Committees**, other European Commission committees contribute to shaping EU policies and programmes relevant to the space sector. Notably, the **Programme Committee for Horizon Europe** – Framework Programme for Research and Innovation (Digital, Industry and Space) support the strategic orientation and implementation of EU-funded research and innovation activities, ensuring coherence between the EU Space Programme and broader research and innovation objectives.

The **Security Accreditation Board (SAB)** plays a pivotal role as the security accreditation authority for the entire EU Space Programme and all its components. The **Security**

¹⁷¹ European Commission, "RULES OF PROCEDURE FOR THE PROGRAMME COMMITTEE FOR THE UNION SPACE PROGRAMME", Sept. 27 2021, (Link)

¹⁷² European Parliament and the Council, "Regulation (EU) No 182/2011 of the European Parliament and of the Council of 16 February 2011 laying down the rules and general principles concerning mechanisms for control by Member States of the Commission's exercise of implementing powers", 16 Feb. 2011, (Link)

¹⁷³ European Parliament and the Council, "Regulation (EU) No 182/2011 of the European Parliament and of the Council of 16 February 2011 laying down the rules and general principles concerning mechanisms for control by Member States of the Commission's exercise of implementing powers", 16 Feb. 2011, (Link)



Accreditation Department (SADEP) within the EUSPA organization serves the Security Accreditation Board (SAB), with its staff reporting directly to the SAB chairperson, who exercises appointing authority to uphold their independence. In fulfilling its responsibilities, the SAB may need to enter into cooperation agreements;¹⁷⁴ these agreements serve to coordinate certification and accreditation activities effectively.

4.4.1 Galileo and EGNOS

Galileo and EGNOS are a global navigation satellite system and a regional satellite-based augmentation system, respectively, used for various applications. The governance of Galileo and EGNOS is based on the principle of strict division of responsibilities between the EU (represented by the Commission), EUSPA, and ESA.

The Commission owns the Galileo system and has overall responsibility for the programme, managing and overseeing the implementation of all activities, including in the field of security, on behalf of the EU. However, the operational management of the Galileo programme is delegated to EUSPA. ESA is entrusted with Galileo's design, system evolution, and the technical development of its infrastructure.¹⁷⁵ While ESA is responsible for the procurement, launch, and major updates of the satellites, EUSPA is responsible for the operations management of the service maintenance, and minor evolutions of the Galileo system. Additionally, EUSPA oversees the usage of Galileo infrastructure, ensuring that Galileo services are delivered with defined performance and without interruption. Also, EUSPA is responsible for the security accreditation and operates the Galileo Security Monitoring Centre (GSMC), which monitors and takes action regarding security and cybersecurity threats and alert. In parallel, the Council—supported by the EEAS—retains a role

¹⁷⁴ European Union Agency for the Space Programme. “EU Space SAB.” EUSPA (Link), e.g., the one established with EASA in 2023 concerning EGNOS

¹⁷⁵ EUSPA, “Galileo | EU Agency for the Space Programme,” (Link)



in the political-strategic direction of Galileo security as reflected in Council Decision 2021/698.¹⁷⁶

The EGNOS programme is overseen by several key organisations. EUSPA is responsible for the operational phase of EGNOS and overall operational programme management, as well as for communications, market development and promotional activities for the services offered by Galileo and EGNOS. The European Satellite Service Provider (ESSP) acts as the EGNOS service provider within Europe, certified as an Air Navigation Service Provider under the Single European Sky (SES) Regulation. EUSPA has contracted ESSP to operate and provide EGNOS services through 2032. Still, the Commission owns the EGNOS system. Ownership of the assets was transferred from ESA to the Commission for exploitation purposes on 1 April 2009.¹⁷⁷ Lastly, ESA led the technical development of the EGNOS system

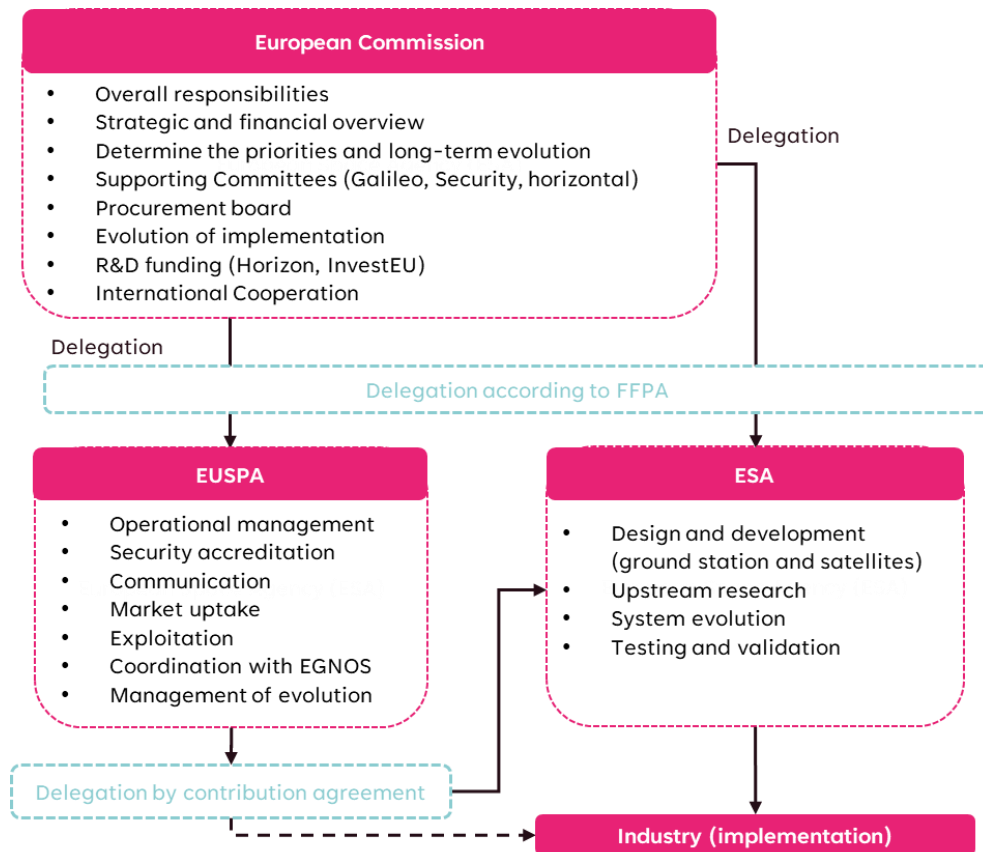


Figure 49: Galileo and EGNOS programmes governance

¹⁷⁶ Council Decision (CFSP) 2021/698 of 30 April 2021 on the security of systems and services deployed, operated and used under the Union Space Programme which may affect the security of the Union, and repealing Decision 2014/496/CFSP, 12 May 2021 (Link)

¹⁷⁷ Council Decision (CFSP) 2021/698 of 30 April 2021 on the security of systems and services deployed, operated and used under the Union Space Programme which may affect the security of the Union, April 2021, (link)



and is currently mandated by the Commission to act as the design and procurement agent for the system evolution.¹⁷⁸ There is also a strong focus on the development of the next generation of Galileo and EGNOS services and the promotion of a deeper integration of satellite navigation data across different policy areas and economic sectors.¹⁷⁹

The Galileo and EGNOS systems are supported by a network of specialised sites and infrastructures across Europe. The **Galileo Control Centres** in Oberpfaffenhofen, Germany and Fucino, Italy, oversee system operations and manage the satellite constellation. For security monitoring, the **Galileo Security Monitoring Centres (GSMCs)** in Saint-Germain-en-Laye, France, and San Martín de la Vega, Spain, provide real-time surveillance, host the EU SST Front Desk, and manage the SST Portal for EU Space Surveillance and Tracking services. User support is provided through the **European GNSS Service Centre** in Torrejón de Ardoz, Spain. Performance verification is carried out at the **Galileo Reference Centre** in Noordwijk, Netherlands, ensuring system accuracy and reliability. Finally, the **Galileo Integrated Logistics Support Centre** in Transinne, Belgium, manages logistical support and system maintenance.

Low Earth Orbit Positioning, Navigation and Timing (LEO-PNT)

In preparation for the EU's 2028–2034 MFF, the European Commission is working on a new sub-component called **LEO Positioning, Navigation and Timing (LEO-PNT)**. LEO-PNT is proposed in the ECF, but discussions between the European Commission and the Member States are still ongoing, particularly regarding its implementation. LEO PNT aims to become the third pillar of the EGNSS, with Galileo remaining the backbone, providing a more resilient component.

In 2024, ESA signed contracts with some European companies to develop Genesis and a LEO-PNT demonstrator, two new missions within the FutureNAV programme. LEO-PNT satellites are expected to provide significant augmentation and diversity to existing and future MEO based GNSS, increasing resilience and enabling new services to places where today's satnav systems cannot reach, like deep urban areas, under heavy foliage, and in polar regions. ESA's LEO-PNT in-orbit demonstrator mission features a constellation of 10 satellites plus two spares that will fly in LEO to test innovative signals across various frequency bands.

¹⁷⁸ European Parliament and Council of the EU, "Regulation (EU) 2021/696 establishing the Union Space Programme" (Link)

¹⁷⁹ DG DEFIS, "Galileo | Satellite Navigation - European Commission," (Link)



4.4.2 Copernicus

The Copernicus programme is the EU's Space Programme component dedicated to EO, coordinated and managed by the Commission, and operated by ESA and EUMETSAT. Copernicus is composed of a fleet of EO satellites providing free and open data on land, the atmosphere, sea, on climate change and other environmental variables, and is also used for emergency management, security, and other applications.¹⁸⁰

Copernicus delivers its services through **six core operational domains**, each relying on specific contributing missions: Emergency Management (EMS), Climate Change Monitoring (C3S), Security/Support to EU External Action, Land Monitoring (CLMS), Atmosphere Monitoring (CAMS), and Marine Environment Monitoring (CMEMS). It is supported by a series of dedicated satellites known as the **Sentinel families**, together with **contributing missions from commercial and publicly owned satellites**. The Sentinel satellites are specifically designed to meet the needs of the Copernicus information services and their users. Since the launch of Sentinel-1A in 2014, the EU has been working towards the deployment of a constellation of nearly 20 satellites by 2030. Of the 14 Sentinel satellites launched since the start of the programme, 13 are currently in orbit.¹⁸¹ In conjunction with ground-based, airborne, and seaborne sensors, these satellites provide comprehensive global data. Most of the information services and the data on which they are based are freely and openly available.

The governance of the Copernicus Programme comprises a **multi-layered structure encompassing various entities and roles**. There are three main components to it: the space component, the in-situ infrastructure, and services. While the Commission acts as the overall programme manager, the **space component** is under the technical coordination of ESA. The Sentinel missions are developed and operated by ESA and EUMETSAT through delegation agreements. Moreover, under the space component, there are also the Copernicus Contributing Missions, coming from Member States and private actors, to continuously complement the programme's dataset. ESA acts as the entrusted entity for

¹⁸⁰ EUSPA, "Copernicus" *EU Agency for the Space Programme*, 29 Apr. 2024, (Link)

¹⁸¹ Sentinels Online (Link). Sentinel-1B's mission ended in 2022 following a malfunction and was replaced by Sentinel-1C

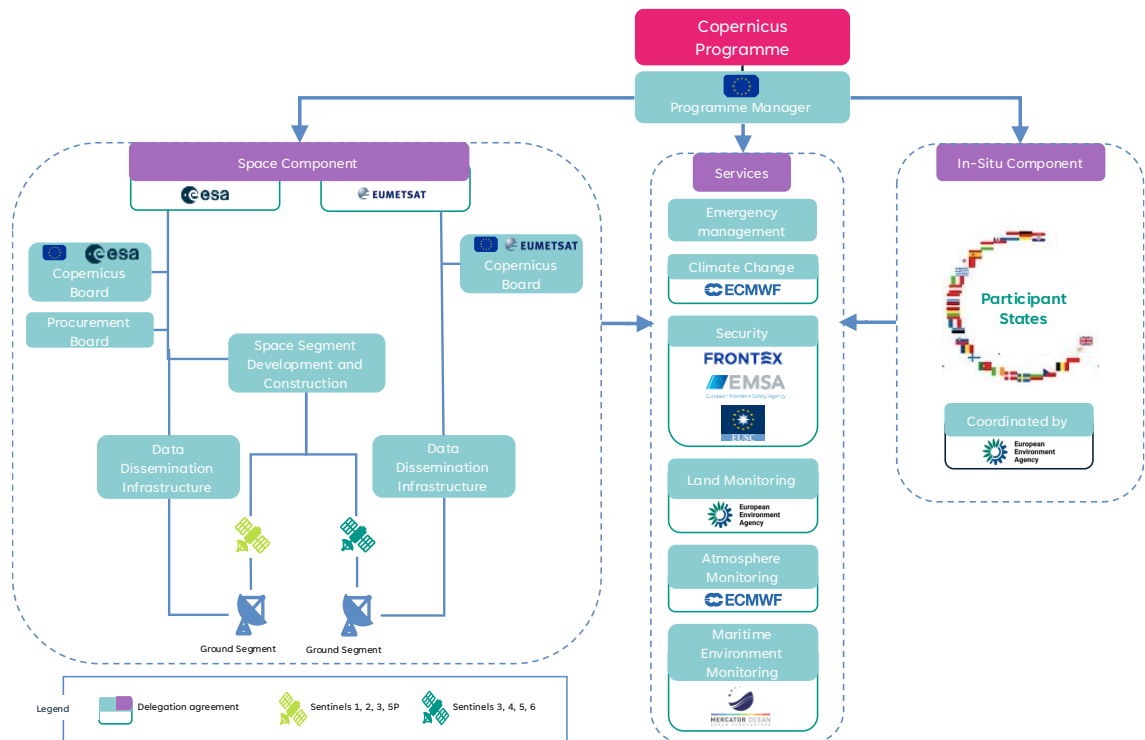


Figure 50: Copernicus Programme governance

the procurement and technical management of Copernicus Contributing Missions on behalf of the EU, complementing Sentinel data with observations from national and commercial satellites.

The **in-situ component**, coordinated by the EEA and mostly delegated to participant states, produces data from ground, sea, and airborne sensors to be used as a reference to validate and calibrate the Copernicus products. The data from the space and in-situ components is fed into services that cover thematic areas, such as land monitoring, marine environment monitoring, atmosphere monitoring, climate change monitoring, emergency management, and security. It is implemented through direct management by the Commission and its agencies, or indirect management via delegation agreements with other agencies, such as FRONTEx, European Centre for Medium-Range Weather Forecasts (ECMWF), and SatCen.¹⁸² The **ground infrastructure** includes ground stations for data acquisition, mission control centres, and data processing, archiving, and dissemination facilities. It supports near-real-time and systematic data flows required by operational services and is operated primarily by ESA and EUMETSAT, with contributions from national entities.

¹⁸² Copernicus, “About Copernicus | Copernicus,” (Link)



Access to Copernicus data and processing capabilities is provided through the **Copernicus Data and Information Access Services (DIAS)**, which are cloud-based platforms operated by contracted service providers under the supervision of the Commission. The **Copernicus Data Space Ecosystem** is the main access point for Copernicus data, integrating DIAS functionalities into a single portal that supports data discovery, processing, and visualization.

In addition to Sentinel data, the **Copernicus Commercial Data Procurement (CDP) scheme** enables the Commission to acquire commercial EO data and services that complement public infrastructures.

European observation governmental services (EO GS)

Under the next MFF 2028–2034, the EO Governmental Services proposal underscores the EU’s commitment to advancing its EO capabilities, reflecting the growing importance of Copernicus in monitoring environmental changes and supporting global sustainability efforts. The Commission is currently laying the groundwork for the establishment of the EO Governmental Service (EOGS), with the potential of becoming a key component for its security and space strategy.¹⁸³ Building on the expertise of SatCen and EUSPA, EOGS is designed to strengthen overall European intelligence, surveillance and reconnaissance capabilities.¹⁸⁴ It is expected to integrate already existing commercial EO capacities available in Europe.

While the EOGS is proposed in the ECF, there is still discussion ongoing between European Commission and Member States on certain aspects, including its implementation. The Member State support expressed at the ESA CM25, where the European Resilience from Space (ERS) programme was oversubscribed, confirms the strategic importance of ERS and enables ESA to prepare, at the broader European level, precursor activities for the EU EO GS programme.

4.4.3 Space situational awareness

The SSA component has the objective of monitoring and preventing space hazards through a holistic approach organised among three sub-components: EU SST, Space Weather (SWE), and Near-Earth Objects (NEO).

Focusing on the **EU SST**, Member States can join the SST partnership and participate in the provision of SST services upon a comitology. The goal is to ensure the resilience of

¹⁸³ European Commission. “Developing reconnaissance capabilities at an EU level.”, 23 January 2024 ([Link](#))

¹⁸⁴ Peter B. de Selding. “EU Commission pushing for dedicated geospatial defense service; Multi-nation Atlantic constellation pivots to defense.”, Space Intel Report, 17 February 2025 ([Link](#))



European space infrastructure against collisions in space, re-entry events, and fragmentation. To that end, the SST services are available to users free of charge and only require that they register in the SST Service Provision Portal. Furthermore, by implementing the capabilities necessary to track these kinds of events, the EU aims to cement its strategic autonomy in space.

On the European level, the SST Partnership is currently composed of 15 EU Member States.¹⁸⁵ At the end of 2025, it was announced that new Members including Belgium, Bulgaria, Lithuania, and Luxembourg would join the Partnership.¹⁸⁶ The Partnership's members network and pool their resources and assets to drive the SST services to all EU Member States and institutions, spacecraft owners and operators, and other commercial, private or public actors. These states retain control of their sensors and operations centres, which may be civilian, military or a combination of both to ensure security. Governance includes a steering committee, a technical committee and a security committee, the latter overseeing data security and operational risks. The service model divides the work among the Member States for sensor networking, data processing and service provision, using networked national assets (e.g., radars, telescopes, etc.), complemented by commercial assets.

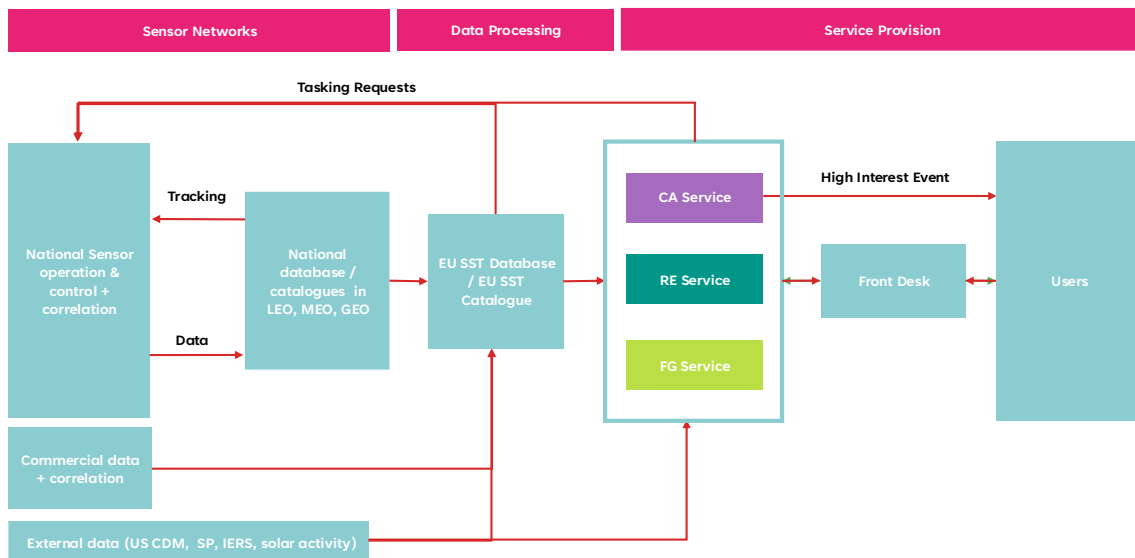


Figure 51: Overall EU SST architecture and types of services

In a Joint Communication released in 2022, EU institutions have also agreed that another goal of this sub-component is to not only involve all EU stakeholders, but also to guarantee

¹⁸⁵ EUSPA, “EU SST | EU Agency for the Space Programme,” (Link)

¹⁸⁶ Directorate-General for Defence Industry and Space. “Belgium, Bulgaria, Lithuania and Luxembourg are set to join EU SST Partnership.” DG DEFIS, 19 December 2025 (Link); adoption of the Implementing Decision C(2025)8684



cooperation with partners through burden sharing.¹⁸⁷ In this context, third countries and international organisations may have access to EU SST services provided that they conclude an agreement of access and that they comply, where applicable, with relevant conditions on the exchange of classified information. In its current status, the SST Partnership regularly collaborates with external partners, and third countries ensure safe and secure space activities, as of now most notably with the U.S.

The SST Partnership works together with EUSPA to develop the EU SST Capabilities.¹⁸⁸ In particular, EUSPA is designated as the **SST Front Desk** responsible for the operational provision of SST services to entitled users, including service request handling, performance monitoring, user coordination, engagement and communication.¹⁸⁹ EUSPA's role encompasses the operation and maintenance of the SST Service Provision Portal and the facilitation of user uptake and service continuity.¹⁹⁰ EUSPA also supports activities related to the security monitoring and related requirements of the EU SST system in cooperation with the Commission and the SST Partnership of Member States.¹⁹¹

The goal of the space weather services is the protection of European infrastructures from space weather events, such as solar storms that can disrupt satellite signals, create drag for LEO satellites, and harm electric power grids. The **space weather sub-component of SSA** is meant to support the assessment of these risks and their consequences and to understand which assets might be impacted in case of specific space weather activities. The selection of public or private entities to provide SWE services will be performed through a call for tender.¹⁹² Moreover, within the SWE sub-component research and innovation activities are also performed. Though space weather services already exist in some European countries and within several sectors (e.g., commercial airlines, the launch and satellite industry, drilling and surveying operations, power grid operators, users of satellite-based navigation systems, etc.), the existing services do not address all user needs and all relevant infrastructures.

The goal of the NEO sub-component is to protect European infrastructures from NEO events. To that end, the EU Space Programme foresees mapping Member States capacities for detecting and monitoring near-Earth objects, promoting data and knowledge sharing, developing the catalogue of near-earth objects, as well as a rapid response service that can characterise them. Lastly, the Commission may develop a service to coordinate and

¹⁸⁷ European Commission, "An EU Approach for Space Traffic Management An EU contribution addressing a global challenge," 15 Feb. 2022 (Link)

¹⁸⁸ European Union Agency for the Space Programme. "EU SST." EUSPA (Link)

¹⁸⁹ Ibid.

¹⁹⁰ EU SST. "EUSPA, the new EU SST Front Desk." EU SST (Link)

¹⁹¹ European Union Agency for the Space Programme. "EU SST." EUSPA (Link)

¹⁹² European Union Agency for the Space Programme. "SSA." EUSPA (Link), Defence Industry and Space. "Commission adopts Decision selecting a space weather service as part of the SWE sub-component of the EU Space Programme." European Commission, 17 March 2025 (Link)



involve appropriate UN bodies and EU Member States if a near-Earth object is found to be approaching Earth.

Several SWE and NEO tasks have been entrusted to ESA under the FFPA and associated contribution agreements. In particular, ESA's activities include mapping Member States' capacities for SWE and NEO detection and monitoring, establishing and maintaining a European NEO catalogue, and elaborating user needs and service quality criteria for SWE and NEO services on behalf of the EU.

4.4.4 Governmental satellite communications

The GOVSATCOM component is tailored to address the need for secure, guaranteed, and autonomous governmental satellite communications for security-related activities for the EU and its Member States. It is a crucial element of the Space Strategy for Europe (2016)¹⁹³ and the European Defence Action Plan (2016).¹⁹⁴ It is implemented in close collaboration with EU Member States, EUSPA, EEAS, ESA, and numerous other EU agencies and actors.

In accordance with the EU Space Programme, the participants of GOVSATCOM are the Member States, the Council, the Commission, and the EEAS. Participants can join GOVSATCOM if they decide to authorise users to access its services, provide satellite communications capabilities, ground segment sites or part of the ground segment facilities. To that end, each participant shall designate one competent GOVSATCOM authority to be responsible for security requirements, management of access rights for users, and for establishing a central point of contact to report security risks and threats.

EUSPA has been entrusted with preparatory activities for GOVSATCOM, including the establishment, growth, coordination and management of the network of future users, with the aim of building a solid user perspective to support the GOVSATCOM mission. This network—in development within the ENTRUSTED Horizon Europe project—comprises 25 organisations from Member States and EU agencies. In addition, EUSPA is working to help define the security baseline for the programme, which is essential to ensure that GOVSATCOM meets the security requirements of its users. The agency is also defining the architecture for the programme's secure ground infrastructure.¹⁹⁵

The GOVSATCOM Hubs aims to serve as a single point of access for GOVSATCOM users, which include the EU and Member State's public authorities, as well as authorised individuals, to GOVSATCOM services. By consolidating user requirements, the Hub integrates various satellite and ground infrastructure capabilities into a coherent system-of-systems framework. Located at a secure and protected sites, the GOVSATCOM Hub is

¹⁹³ European Commission, *Space Strategy for Europe* (European Union, October 2016), (Link)

¹⁹⁴ European Commission, *Press release European Defence Action Plan: Towards a European Defence Fund*, 2016, (link)

¹⁹⁵ European Parliament and Council of the EU, "Regulation 2021/696 establishing the EU Space Programme" 2021, (Link)



also responsible for monitoring service capacity and planning, as well as maintaining the security of the entire system.¹⁹⁶ The two main GOVSATCOM control centres are in Agios Ioannis, Greece, and Cologne, Germany. GOVSATCOM is expected to start providing initial services by end-2025, while the start of full services is expected by mid-2027.

In addition, EUSPA coordinates user aspects for civilian user communities and may monitor operational use, demand, compliance and evolution of needs and requirements, although, according to the EU Space Programme Regulation, relevant Union bodies with close user ties may have a coordinating role for specific user groups. Those bodies include the EDA, FRONTEX, the European Maritime Safety Agency, the European Fisheries Control Agency, the EU Agency for Law Enforcement Cooperation, the Military Planning and Conduct Capability/Civilian Planning and Conduct Capability and the Emergency Response Coordination Centre. It is also possible for third countries and international organisations to participate in the GOVSATCOM. Namely, it is open to participants from members of the European Free Trade Association (EFTA), as well as acceding countries, candidate countries, potential candidates, and European Neighbourhood Policy countries.

Infrastructure for resilience, interconnectivity and security by satellite

Regulation 2023/588 establishes the **Union Secure Connectivity Programme** for the remainder of the MFF 2021-2027 period (2023-2027) and provides two general objectives for the Programme:

- “Ensuring the provision and long-term availability within the Union’s territory and worldwide uninterrupted access to secure, autonomous, high-quality, reliable and cost-effective satellite governmental communication services by establishing a multi-orbital, secure connectivity system”.
- “Enabling the provision of commercial services, or services offered to government-authorized users based on commercial infrastructure at market conditions (...) to facilitate the further development of worldwide high-speed broadband and seamless connectivity as well as removing communication dead zones and increasing cohesion across Member States’ territories”.¹⁹⁷

Regulation 2023/588 on the Union Secure Connectivity Programme also lay the conditions for the establishment of an Infrastructure for Resilience, Interconnectivity and Security by Satellite (IRIS²). In December 2024, the Commission and the SpaceRISE consortium signed a 12-year, €10.6B concession contract to develop and operate the **IRIS² satellite**

¹⁹⁶ EUSPA, *Secure SATCOM Market and User Technology Report.*, 2023, (Link), p. 12

¹⁹⁷ European Parliament and Council of the EU, “Regulation (EU) 2023/588 establishing the Union Secure Connectivity Programme for the period 2023-2027” (Official Journal of the European Union, 17 Mar. 2023), (Link).



constellation.¹⁹⁸ The initiative reflects the EU's strategic objective to secure and improve communications infrastructure. Within its governmental role, IRIS² services will be pooled together with the previously described pool of services to be shared through the GOVSATCOM Hub, thus complementing the GOVSATCOM programme.

The IRIS² system infrastructure is designed as a comprehensive multi-orbital constellation system, integrating all the necessary space and ground components required for the delivery of IRIS² governmental and commercial services.¹⁹⁹ The objective is then two-fold, i) ensure secure, autonomous, high-quality, reliable and cost-effective satellite governmental communication services to government-authorized users and enable commercial services, or ii) services offered to government-authorized users based on

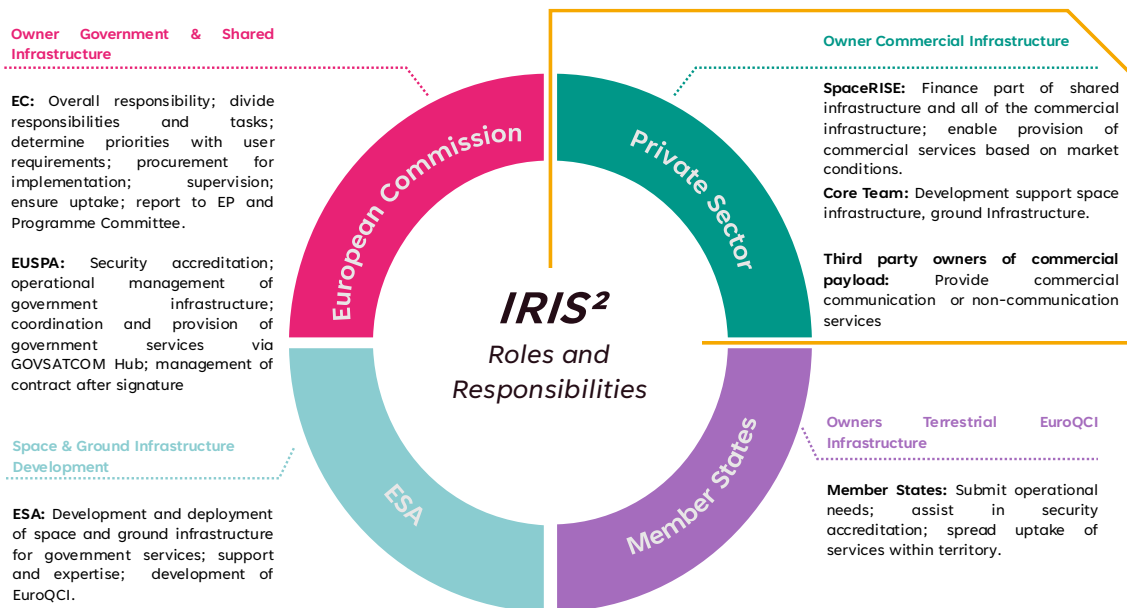


Figure 52: IRIS² roles and responsibilities

commercial infrastructure at market conditions.

“The planned IRIS² constellation will consist of over 280 satellites: 264 in LEO-H, 10+ in LEO-L, and 18 in MEO, with first launches anticipated in 2029 and the last one expected by 2032. Operations will span multiple frequencies, including Ka-gov, UHF, and optical. ... The parallel commercial objective of IRIS² is to facilitate commercialisation of services of operators that will provide mass-market solutions and non-sensitive government services, including mobile broadband and cloud services. Notably, through commercial services,

¹⁹⁸ Aurélie Pugnet, “EU communication satellite network to see light of day with new €10.6 bn deal” Euractiv. (16 Dec. 2024), (Link)

¹⁹⁹ DG DEFIS, IRIS² Industry Information Day European Commission., 2023, (Link)



IRIS² should improve secure connectivity over geographical areas of strategic interest, such as Africa and the Arctic, the Baltic, the Black Sea, the Mediterranean, and the Atlantic.”²⁰⁰

4.5 EU space budget & budgetary process

The EU budget is regulated through a **Multiannual Financial Framework (MFF)**. It delineates how much money the EU will spend in the next seven years for broad policy areas, named headings, and sets the maximum amount of annual spending. The Member States can also do targeted revisions of the MFF throughout its seven-year run in response to unforeseen circumstances.

4.5.1 EU space budget instruments

The current EU Space Programme budget was decided through the MFF for 2021-2027, which was agreed upon in December 2020 and allocated €14.9B (distributed over seven years) to the pursuit of objectives associated with each of the described space components.²⁰¹ While the final revised budget remained lower than the original proposal, the overall space envelope still represents a €3.8B or a 36% increase compared with the previous MFF 2014-2020 (€11.1B, current).²⁰² The Space Programme budget was then supplemented by a further €2.2B from the EU until 2027 for the IRIS² programme.²⁰³

The 2021-2027 MFF includes **financial instruments** providing support to flagship programmes and funding for other domains, including topics such as technology non-dependence, space defence, and support to private space. Important programmes include InvestEU, Horizon Europe, the European Innovation Council (EIC) and the EDF.

InvestEU and CASSINI

The InvestEU programme is the EU’s main investment programme aimed at fostering innovation and facilitating access to funding. Initially, the InvestEU Fund aimed to mobilise more than €372B in investments by 2027 through an EU guarantee of around €26.2B at a provision rate of 40%, leading to a maximum guaranteed allocation of around €10.5B.²⁰⁴ As of December 2024,²⁰⁵ the Fund managed to mobilise €299B (80% of the target), with around 90% of the original guarantee already signed.²⁰⁶ In the Fall of 2025, the Council and the

²⁰⁰ ESPI, “Brief No. 72. IRIS² Growing Up: From Strategic Roots to Commercial Power Play”, ESPI, April 2025, (Link)

²⁰¹ European Parliament and Council of the EU, “REGULATION (EU) 2021/696 establishing the Union Space Programme and the European Union Agency for the Space Programme and repealing Regulations” (Official Journal of the European Union, 12 May. 2021) (Link).

²⁰² “Visualising the Proposed EU 2021, 2027 MFF and the Recovery Instrument,” European Parliament, November 2020, (Link).

²⁰³ “REGULATION (EU) 2023/588 of the EUROPEAN PARLIAMENT and of the COUNCIL of 15 March 2023 Establishing the Union Secure Connectivity Programme for the Period 2023-2027”, Official Journal of the European Union, (Link).

²⁰⁴ European Commission, *InvestEU Risk Methodological Framework InvestEU.*, September 2021, (Link), p. 22

²⁰⁵ European Union. “InvestEU Indicators – InvestEU.” (Link)

²⁰⁶ European Commission. “InvestEU – Performance.” (Link)



Parliament also reached a provisional agreement to increase the Fund’s EU guarantee by €2.9B to mobilise an extra €25B of investment.²⁰⁷

Even though InvestEU does not specifically cater to the space sector, instead having four broad objectives (sustainable infrastructure, research, innovation and digitalisation, SMEs, and social investment and skills), it does mention space as an area eligible for financing. The guarantee available under the InvestEU Fund is implemented in partnership with selected financial partners, which include the EIB, the European Investment Fund (EIF), and Cassa Depositi e Prestiti Equity.

Additionally, as part of the InvestEU programme, CASSINI was created in partnership with the EIB and EIF. CASSINI includes a €1 billion EU seed and growth fund, hackathons and mentoring, prizes, a business accelerator, partnering and matchmaking aimed at boosting European space start-ups. The programme was announced in the context of the EU Space Programme objectives. The initiative was officially established in January 2022 and is managed by DG DEFIS. CASSINI, under its Access to Finance component, provides investment guarantees specifically for space investments.

Horizon Europe and the European Innovation Council

Another important funding instrument complementing the EU Space Programme is **Horizon Europe**, the ninth iteration of the Union’s Framework Programmes for Research and Technological Development. The Horizon Europe programme was established in April 2021 to enhance the impact of research and innovation while spreading expertise and technologies across the EU. Originally, it was allocated a budget of €95.5B, but after the 2023 mid-term revision of the MFF, its budget was decreased by €2.1B.

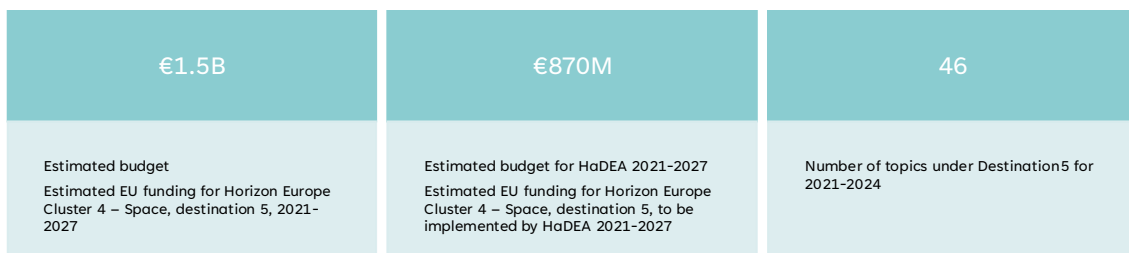


Figure 53: Horizon Europe figures

Horizon Europe funds only civilian projects across three pillars: Excellent Science, Global Challenges and European Industrial Competitiveness, and Innovative Europe.²⁰⁸ Unlike in Horizon 2020, where space was given its own section under the “Leadership in enabling and industrial technologies” part of the programme, in Horizon Europe, space is combined with digital and industrial development under Cluster 4 (“Digital, Industry and Space”) of

²⁰⁷ Council of the EU. “InvestEU: Council and Parliament agree to make the programme easier and more efficient”, 23 September 2025, (Link)

²⁰⁸ European Commission, “Horizon Europe,” 2021. (Link)



Pillar 2. This was likely done to provide for more synergies with the digital and industry portfolio, as several calls listed in the 2023-2025 Work Programme encourage usage of Space Programme's assets in digital and industry projects.²⁰⁹ While the space projects in this cluster are primarily designed to meet R&I needs of the Space Programme, they also encompass additional strategic areas, including reusable launchers, in-orbit demonstration and validation (IOD/IOV) activities, and space science. In several cases, these activities are developed in partnership with ESA.²¹⁰

While space programmatic priorities (destination 5) are under the purview of DG DEFIS,²¹¹ other destinations fall under other Directorates and actors, including DG CONNECT for Digital and Directorate-General for Research and Innovation (DG RTD) for Industry.²¹² EIC, under the management of the European Innovation Council and SMEs Executive Agency (EISMEA), also develops its own programmatic priorities in space.²¹³ Within destination 5, DG DEFIS has also delegated the actual implementation of most programmatic priorities to the European Health and Digital Executive Agency (HaDEA)²¹⁴, EUSPA²¹⁵ and ESA²¹⁶ for some projects.

Within the third pillar of Horizon Europe, the **European Innovation Council (EIC)** was also launched in 2021 to identify and support innovation across a product's lifecycle. With a budget of €10B, the EIC aims to finance startups and SMEs, focusing on breakthrough technologies and innovation through three main calls: EIC Pathfinder, EIC Transition, and EIC Accelerator. This initiative targets strategic areas, including space-related ones, such as quantum technologies, innovative applications of space data, and the development of space technologies. In space, the EIC's portfolio addresses three key pillars: Space Debris Sustainability, Enabling Space Technologies, and Earth Observation and Meteorology. Since 2021, EIC's space-focused calls have included, for instance, €32M for in-space solar energy, €65M for customer-driven space tech, and €50M for in-space servicing and robotics. However, the distribution of this funding within Europe has been uneven, with over 50% of grant funding disbursed just to France and Germany.

The European Defence Fund

EDF, which has been established with a budget of approximately €8B for the period 2021-2027, is a grant programme from the Commission to strengthen defence research and development and promote an innovative and competitive industrial base. The programme is structured in yearly calls for projects with specific budgets. The budget allocated for

²⁰⁹ Commission, "Horizon Europe WP 2023-2025 7. Digital, Industry and Space" (Horizon Europe, April 17, 2024). (Link)

²¹⁰ About - European Commission. See also Implementation context - European Commission

²¹¹ HaDEA, "About the Horizon Europe - Space Programme," European Commission, n.d., (Link)

²¹² Commission, "Horizon Europe WP 2023-2025 7. Digital, Industry and Space" (Horizon Europe, April 17, 2024). (Link)

²¹³ EIC, "European Innovation Council (EIC) Work Programme 2024," *European Commission*, December 12, 2023, (Link).

²¹⁴ HaDEA, "About the Horizon Europe - Space Programme," European Commission, n.d., (Link)

²¹⁵ EUSPA, "Single Programming Document 2022 - 2024," *EUSPA*, March 31, 2022. (Link)

²¹⁶ Commission, "Horizon Europe WP2023-2025 7. Digital, Industry and Space" (Horizon Europe, April 17, 2024). (Link)



space-related calls has fluctuated over the years, first increasing from €50M in 2021 to €150M in 2022, following by a decrease back to €50M in 2024. In February 2024, a provisional agreement was signed following the 2023 mid-term MFF revision, which allocated an additional €1.5B to EDF from the Strategic Technologies for Europe Platform programme. In 2025, the budget allocated for space-related calls went back up to €115M. EDF is managed directly by the European Commission according to Article 8 of EDF Regulation 2021/697. The Commission is responsible for selection and award procedures, including ethics screening and assessment. In specific cases, at the request of Member States, the Commission may delegate budget implementation tasks for certain actions to other bodies, such as EDA, which became eligible as an implementing partner for the indirect management of some specific EDF calls in 2022.

4.5.2 The next EU budget: MFF 2028-2034

Between July and September 2025, the Commission submitted two complementary packages outlining its **proposal for the MFF 2028–2034**.

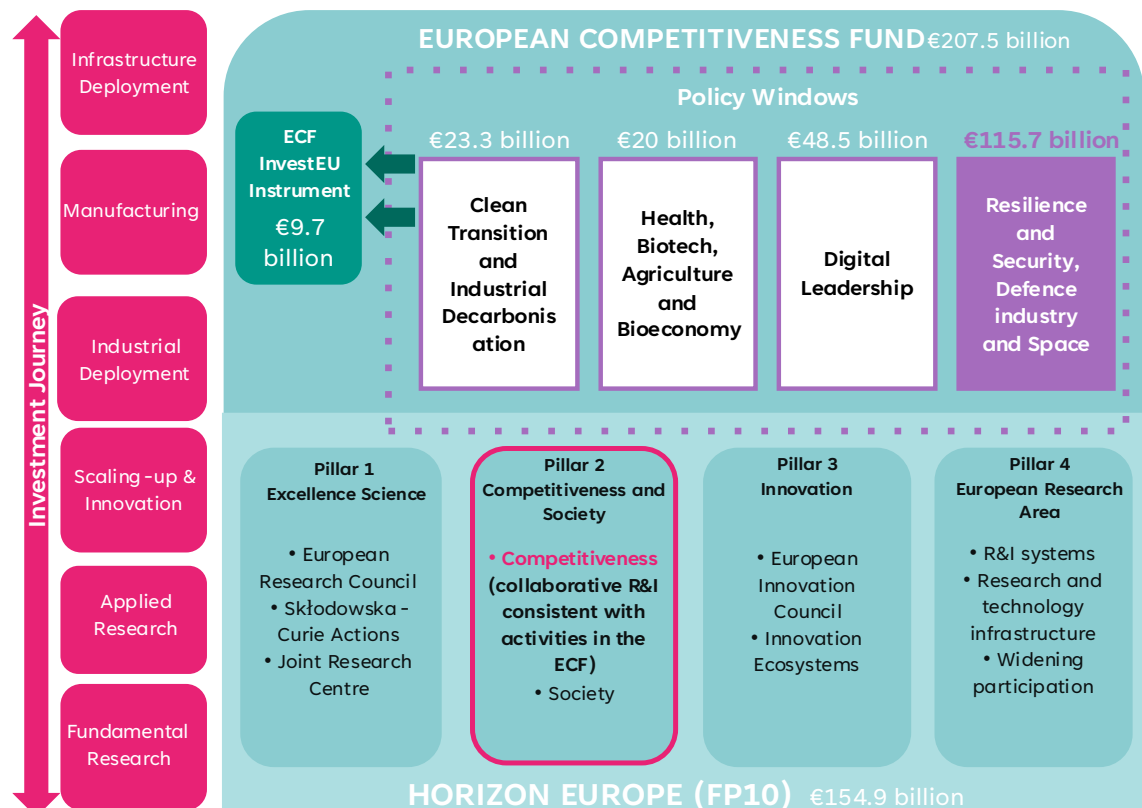


Figure 54: The ECF and Horizon Europe overview (Source: ESPI, EU Commission)

The plan aims to remedy shortcomings in the current MFF (2021–2027) by creating a budget that is more flexible, streamlined, coherent, and strategically aligned with the



Union’s key priorities—competitiveness, sovereignty, and resilience. **The proposal foresees a major simplification of the MFF architecture, reducing the number of headings from seven to four** and programmes from 52 to 16, thereby merging related policy strands and consolidating budgetary envelopes. Moreover, as a backdrop to the changes in the budget architecture stands the Draghi report and the **widening productivity gap between the EU and other advanced economies**. The EU Commission answered the challenge with a guidance document, the Competitiveness Compass, establishing a series of steps to address the problem. Among these is the **European Competitiveness Fund (ECF), which will serve to provide better directionality to EU investments and cover the whole investment journey in a single instrument**.

The ECF is organised around four policy windows, with space being integrated in the “Resilience and Security, Defence Industry, and Space”, meaning it ceases to have a ring-fenced budget. The proposed indicative amount for this policy window is €115.7 billion in 2025 prices, the largest among the ECF. The EU Space programme components are included in a section within this policy window called “Space Systems and Space Policy Implementation”.

For the space section, the EU Commission is proposing an evolutionary approach. It keeps the classical components with PNT, EO, Secure Connectivity, and SSA with their respective sub-components, notably with **two new additions with LEO Positioning, Navigation and Timing (LEO-PNT) and the EO Governmental Service (EOGS)**. On top of the four classical components, **the Commission proposes three new components**: Space Commercialisation and Space Economy (which will include the CASSINI initiative), Technological Sovereignty, Research, and Innovation to develop critical space technologies for EU non-dependence,

Positioning Navigation and Timing	•Galileo & EGNOS •LEOPNT
Earth Observation	•Copernicus •Earth Observation Governmental Service
Secure Connectivity	•IRIS2 •GOVSATCOM
Space Situational Awareness	•Space Surveillance and Tracking, Space Weather Tracking & Near-Earth Objects
Access to Space	
Space Commercialisation and Space Economy	
Technological Sovereignty, Research, and Innovation	

Figure 55: Components of the Space Section of the Resilience and Security, Defence Industry and Space policy window of the ECF.



and lastly Access to Space with three main axes, aggregating demand, access to space innovation and upgrading ground systems and infrastructures.

In terms of governance and rules, the ECF primarily entrusts EUSPA and ESA as its operational agency and technical implementing agency, respectively. EUSPA serves as the European Union's entrusted operational agency, carrying out its own tasks and additional tasks in accordance with its founding Regulation. Moreover, it acts as a key budget-implementing partner under indirect management via a tripartite agreement with the Commission and ESA. ESA acts as the primary technical implementing agency for PNT, Copernicus, EOGS and IRIS², and may also be entrusted with other tasks “based on the needs of the activities”, provided there is no duplication with other entrusted entities and implementation efficiency is improved. Among additional non-technical tasks, there is the possibility of EUSPA, for example, being entrusted with budget implementation under indirect management.

The Framework Programme for Research and Technological Development, currently called “Horizon Europe”, is tightly connected to the ECF on budgetary and programmatic levels (especially on Pillar 2) but maintains self-standing pillars of research.

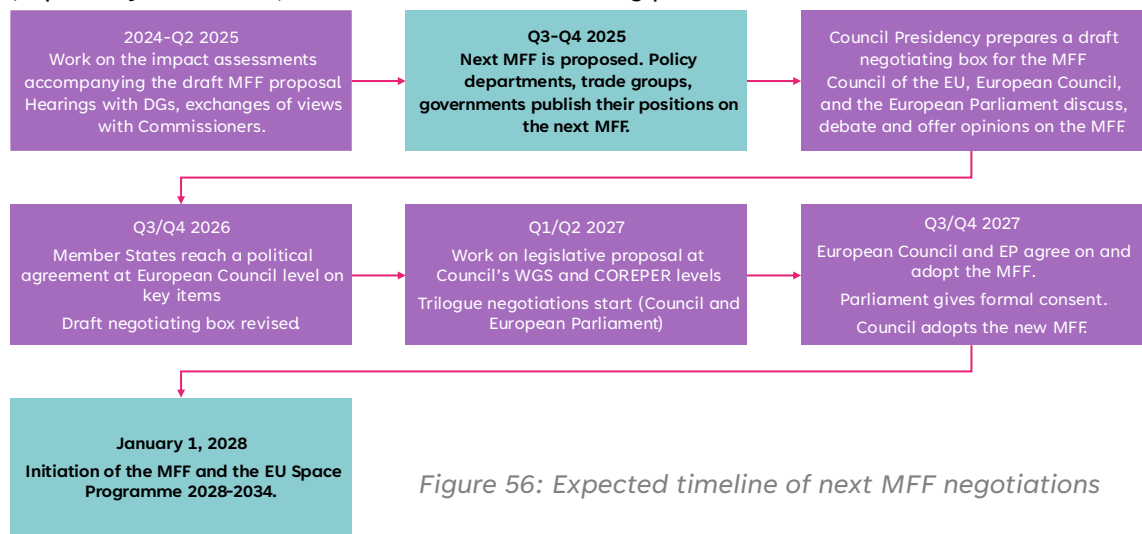


Figure 56: Expected timeline of next MFF negotiations

4.6 International cooperation

International cooperation constitutes a fundamental dimension of the EU's space policy. It enables the Union to promote the peaceful use of outer space, foster the global uptake of its space programmes, and advance scientific, technological, and industrial competitiveness in line with its broader external policy objectives.

Through cooperation, the EU contributes to a rules-based, sustainable, and secure space environment while reinforcing the integration of space into its diplomatic, development,



and security agendas.²¹⁷ The foundations of the EU's external action in space were laid by the Council Resolution on the European Space Policy (2007), which first called for a coherent European approach to international relations in space and enhanced coordination between the European Commission, ESA, and the Member States.²¹⁸ This early framework has since evolved into a more structured system under the Regulation (EU) 2021/696 establishing the Union Space Programme, which provides the current legal basis for the EU's space activities, including their external dimension.

The EU's international engagement in space is **steered jointly by the European Commission and EEAS**, in coordination with Member States. Their action is guided by key strategic documents, notably the EU Space Strategy for Security and Defence (Joint Communication, 2023), which recognises space as a strategic domain and emphasises cooperation with NATO, the United States, and other like-minded partners.²¹⁹ The Union pursues its external action through bilateral and multilateral frameworks addressing areas such as Earth observation, satellite navigation, secure connectivity, space traffic management, research, and the sustainable use of outer space.

Within the EU institutional framework, several entities contribute to the implementation of international cooperation in specific domains. **Core actors** include **EUSPA**, which promotes the global use and market uptake of EU space services such as Galileo, EGNOS, and Copernicus, and facilitates interoperability with third-country systems; and **SatCen**, which supports international security and crisis management through geospatial intelligence cooperation with EU partners and multilateral organisations. **Supporting entities** play complementary roles: **EDA** fosters cooperation in dual-use and defence-related space technologies, including secure communications and situational awareness; the **European Environment Agency (EEA)** promotes the international use of Copernicus data for climate monitoring and environmental governance; and the **European Investment Bank (EIB)** supports the external dimension of EU space policy by financing infrastructure and innovation projects that reinforce Europe's industrial competitiveness. Beyond the EU institutional framework, **European intergovernmental organisations**, such as **ESA** and **EUMETSAT**, complement the EU's international outreach through their own cooperation agendas. While not EU bodies, their close alignment with EU priorities and their operational role in implementing components of the EU Space Programme ensure coherence between European and national external activities in the space domain. Earlier coordination mechanisms – such as the High-Level Space Policy Group (HLSPG) or the European Commission–ESA Joint Secretariat – played a role in the initial phase of EU–ESA

²¹⁷ The guiding principles of EU external action and development cooperation are found in Article 21 of the Treaty on EU and Article 208 of the Treaty on the Functioning of the EU, respectively.

²¹⁸ Council of the EU, Resolution on the European Space Policy, May 2007, (Link)

²¹⁹ European Commission, European Union Space Strategy for Security and Defence, March 10, 2023, (Link)



cooperation but are no longer formally active, having been superseded by new governance arrangements under the current legal framework.

The EU maintains structured space dialogues and cooperation frameworks with strategic partners, including the United States, Japan, Canada, India, South Korea, and Brazil. Engagement with emerging space actors in Africa, Latin America, and Asia has expanded through policy dialogues, capacity-building activities, and the promotion of EU space data and services.²²⁰ International cooperation in space is supported under the **Neighbourhood, Development and International Cooperation Instrument – Global Europe (NDICI – Global Europe)**, which entered into force as part of the 2021–2027 MFF.²²¹ In general, this instrument consolidated several previous external action tools to provide a single and flexible source of funding aimed at strengthening the EU’s strategic partnerships and promoting the uptake of its services abroad. By integrating space-related initiatives within broader external policy objectives, NDICI – Global Europe aims to contribute to advance the Union’s goals in areas such as climate action, security, digital transformation, and sustainable development. In certain cases, third countries are also associated with EU space programmes and IRIS², under specific legal and political conditions defined in EU legislation and international agreements. Such association can grant varying degrees of participation, while excluding access to sensitive security-related elements.

Under the European Commission’s proposal for the next MFF, presented in July 2025 and currently under negotiation, **the external action architecture is expected to evolve further**. The proposal foresees the establishment of a new Global Europe Instrument, building on the experience of NDICI-Global Europe, with the aim of moving towards even greater flexibility and simplifying procedures in line with the Commission's overall simplification programme.²²² This evolution would ensure that the EU's external financing framework remains adaptable and capable of supporting the international dimension of the Union's space activities in an increasingly complex geopolitical and technological environment.

²²⁰ EUR-Lex, International Cooperation (Link)

²²¹ REGULATION (EU) 2021/947 establishing the Neighbourhood, Development and International Cooperation Instrument – Global Europe, June 2021 (Link)

²²² European Commission, Proposal for a Regulation establishing the Global Europe instrument, July 2025, (Link)



5 RELATIONS BETWEEN ESA AND EU

ESA and the European Union are the two main intergovernmental actors shaping Europe's space landscape. Although they differ in structure, membership, and mandate, both share the overarching objective of harnessing space activities for societal, economic, and security benefits. Over the past decades, their cooperation has deepened, aligning programmes, resources, and strategic objectives to strengthen Europe's global position in space. As reflected in various ESA and EU policy documents, their partnership rests on common objectives:

- **Advancing European space capabilities**, strengthening Europe's technological autonomy in areas such as navigation, EO, launchers, and telecommunications.
- **Enhancing societal benefits**, using space assets for environmental monitoring, disaster management, and climate action.
- **Promoting economic growth**, supporting innovation, research, and industrial competitiveness to sustain a dynamic European space sector.
- **Ensuring security and strategic autonomy**, coordinating efforts to safeguard European interests and reduce dependence on non-European providers.
- **Fostering international collaboration**, representing Europe in global space governance while protecting its strategic interests.

5.1 Frameworks for ESA-EU cooperation

The consolidation of cooperation activities between the EU and ESA occurred progressively through a series of instruments, agreements, and joint institutional initiatives.

The first major step was the creation of the **ESA–European Commission Joint Task Force**, endorsed in 2000 by the European Research Council and by ESA's Council at Ministerial level. Its mandate was to coordinate the policy approaches of both organisations and lay the groundwork for a coherent European space strategy.²²³

A formal legal basis for cooperation was created through the **European Commission –ESA Framework Agreement**, negotiated by the European Commission and approved on behalf of the European Community by the Council of the EU in May 2004.²²⁴ The Agreement established two joint bodies:

- **Space Council**, a joint meeting of the EU and ESA council at ministerial level to coordinate common activities.

²²³ ESA. "N° 12–2001: ESA-European Commission Joint Task Force on European Strategy for Space meets for the first time in Brussels." (Link)

²²⁴ Council Decision of 29 April 2004 on the conclusion of the Framework Agreement between the European Community and the European Space Agency Framework Agreement between the European Community and the European Space Agency, 2004/578/EC (Link)



- **High-Level Space Policy Group (HLSPG)**, bringing together EU and ESA Member States to oversee implementation of the European Space Policy and related programmes.

The Treaty of Lisbon further strengthened these cooperative arrangements. In 2007, **Article 189(3) of the TFEU** explicitly empowers the EU to “establish appropriate relations with the European Space Agency,” thereby recognising ESA’s unique technical expertise and providing a treaty-level foundation for continued interorganisational cooperation. In parallel, the **Resolution on the European Space Policy**, adopted by the Space Council, sought to enhance coordination, avoid programme overlap, and clarify institutional roles in the development and management of European space activities.²²⁵

In 2016, ESA and the European Commission signed a **Joint EU–ESA Statement on “Shared Vision and Goals for the Future of Europe in Space”**, which reaffirmed converging strategic priorities and long-term cooperation across programme development, industrial policy, and capability planning.²²⁶

Cooperation reached a new stage with the **FFPA** in 2021 between ESA, the European Commission and EUSPA, defining roles, responsibilities, governance mechanisms, and financial arrangements for each component of the EU Space Programme.²²⁷ The FFPA confirms ESA’s role as the main technical and implementation partner, assigns programme operations and service provision responsibilities to EUSPA,²²⁸ and sets out coordination and control mechanisms for shared programme management. It also covers major initiatives including the development of the next generation of the Galileo navigation system and the evolution of the Copernicus programme.

Following the need to implement the Framework Agreement in 2004 in areas of common interest and programmes,²²⁹ several Contribution Agreements and Delegation Agreements have been signed before and after FFPA for the implementation of specific EU initiatives, including Galileo and Copernicus, as well, more recently, on other matters such as Horizon Europe, secure connectivity and Destination Earth (DestinE). For instance, separate Contribution Agreement have been developed for the deployment of IRIS² programme.²³⁰

ESA and the Commission also updated their Security of Information Agreement (initially signed in 2008), particularly in relation to IRIS².²³¹ Considering the evolution of ESA in

²²⁵ ESA. “Resolution on the European Space Policy.” (Link)

²²⁶ ESA. “Shared vision and goals for the future of Europe in space.” (Link)

²²⁷ ESA. “ESA and the EU.” (Link)

²²⁸ ESA and EUMETSAT are also in charge of operating part of the Space Programme, especially for what regard Copernicus.

²²⁹ Framework Agreement between the European Community and the European Space Agency, 2004 (Link) – Articles 5

²³⁰ Defence Industry and Space. “IRIS2: European Commission and European Space Agency signed a Contribution Agreement.” European Commission, 21 September 2023 (Link)

²³¹ ESA, “ESA and the EU Update Their Security of Information Agreement,” esa.int, May 22, 2024. (Link)



policy and programmes for the EU and Member States in security matters, an updated the Security Information Agreement can be expected.

ESA's Agenda 2025 called for renewed partnership focused on strengthening industrial competitiveness, technological autonomy, and programme coherence.²³²

The proposed **EU Space Act** foresees provisions that aim to further formalise and structure the ESA-EU relationship. Among these, **Article 108** mandates the conclusion of an **international agreement** between the Union and ESA to ensure the implementation of the Regulation's objectives and requirements. This agreement would delineate the **conditions under which ESA may implement Union-level requirements**, particularly those set out in **Title IV** relating to the technical rules, while also specifying the practical and operational arrangements for controlling the application of those requirements. The Act is currently subject to the EU legislative procedure; if approved, the updated draft is scheduled to take effect in 2030, with a two-year transitional period.

Other ESA-EU cooperation frameworks include agreements with other DGs beyond DG DEFIS (e.g., DG INTPA), SatCen and EDA, as well as the Joint COM-ESA-EDA Task Force on critical technologies for non-dependence.

5.2 Platforms for ESA and EU cooperation

The evolution of the relations between ESA and EU is further shaped by joint event, notably the ESA-EU space council and the Space Summit.

The ESA-EU space council meetings, chaired by the ESA Ministerial Council Chair and by the Minister Chair of the EU Competitiveness Council (Art. 8 (1) 2004 Framework Agreement), serve to: (i) provide orientations; (ii) make recommendations and identify actions; and (iii) advise parties on ways to enhance cooperation. The Space Council first convened in November 2004 and met in 2005.²³³ Its 10th session, held on 20 November 2020 under the German EU Council Presidency and Portuguese-French ESA co-chairs, focused on Europe's positioning in the global space economy.²³⁴ In addition to formal sessions, **informal Space Council meetings** have also been organised to sustain dialogue and were also attended by ministers.

Another high-level coordination forum is the **Space Summit**, composed of two parts: an informal EU Competitiveness Council on Space, attended by EU Ministers responsible for

²³² ESA 2025 Agenda (Full Document, Summary Document)

²³³ ESA, "Europe's Space Policy becomes a reality today (4th Space Council)" ESA, 22 May 2007, (Link)

²³⁴ The Council of the EU, "Key principles for the global space economy: EU Council adopts conclusions" (November 2020):



space, the European Commissioner for space, and the ESA Director General; and an informal ESA Council at Ministerial Level. **Informal joint meetings** took place in 2015, 2016, and 2017. The first Space Summit was held in Toulouse (16 February 2022) under the French EU Council Presidency, followed by the second Summit in Seville (2023), hosted during Spain's EU Presidency and chaired by Germany at the ESA Ministerial level.

Date	Status	Output
Nov 2004	Space Council	Orientation – <i>First orientations on the preparation of the European Space Programme</i> ²³⁵
Jun 2005	Space Council	Orientation – <i>Orientations from the Second Space Council</i> ²³⁶
Nov 2005	Space Council	Orientation – <i>Third Space Council focusing on Global Monitoring for Environment and Security (GMES)</i> ²³⁷
May 2007	Space Council	Resolution – <i>On the European Space Policy</i> ²³⁸
Sep 2008	Space Council	Resolution – <i>Taking forward the European Space Policy</i> ²³⁹
May 2009	Space Council	Orientation – <i>Orientations from the Sixth Space Council</i> ²⁴⁰
Nov 2010	Space Council	Resolution – <i>Global challenges: taking the full benefit of European space systems</i> ²⁴¹
Dec 2011	Space Council	Resolution – <i>Orientations concerning added value and benefits of Space for the security of European citizens</i> ²⁴²
Nov 2015	Informal meeting	
May 2016	Informal meeting	
Nov 2017	Informal meeting	
May 2019	Space Council	Resolution – <i>Space as an enabler</i> ²⁴³
Nov 2020	Space Council	Resolution – <i>Orientations on the European contribution in establishing key principles for the global space economy</i> ²⁴⁴
Feb 2022	Informal meeting of Space ministers/Space summit	
Nov 2023	Informal Meeting	
May 2024	Space Council	Resolution – <i>Strengthening Europe's competitiveness through space</i> ²⁴⁵

²³⁵ First orientations on the preparation of the European Space Programme. ESA-EU Space Council, November 2004 ([Link](#))

²³⁶ Orientations from the Second Space Council. The ESA-EU Space Council, June 2005 ([Link](#))

²³⁷ Formal Space Council. Orientations from the 3rd Space Council focusing on GMES. ESA-EU Space Council, 2005 ([Link](#))

²³⁸ Resolution on the European Space Policy. The ESA-EU Space Council, May 2007 ([Link](#))

²³⁹ Formal Space Council. Resolution on Taking forward the European Space Policy. ESA-EU Space Council, Sept 2008 ([Link](#))

²⁴⁰ Orientations from the Sixth Space Council. The ESA-EU Space Council, May 2009 ([Link](#))

²⁴¹ Resolution on Global challenges: taking the full benefit of European space systems. ESA-EU Council, 2010 ([Link](#))

²⁴² Orientations concerning benefits of Space for the security of European citizens. ESA-EU Council, 2011([Link](#))

²⁴³ Resolution on Space as an enabler. The ESA-EU Council, May 2019 ([Link](#))

²⁴⁴ Orientations on the European contribution in establishing key principles for the global space economy. ESA-EU Council, 2020 ([Link](#))

²⁴⁵ Formal Space Council. Resolution on Strengthening Europe's competitiveness through space. The ESA-EU Council, May 2024 ([Link](#))



Cooperation between ESA also includes **mutual participation in key decision-making fora**. In this context, invitations extended by the European Commissioner responsible for space to ESA Ministerial Councils constitute an important symbol and practical mechanism of coordination. This interaction is further reflected in the ESA CM25 Resolution on ESA–EU relations, which explicitly recognises the European Union as a key institutional partner and calls for dedicated sections addressing EU-related programmes, policies, and cooperation frameworks. Symmetrically, invitations for the ESA Director General to address the EU COMPET Council and to engage with the European Parliament provide essential opportunities to present ESA perspectives and inform EU policy debates.

5.3 Organisational tools for ESA-EU cooperation

Within the **European Commission**, ESA interfaces mainly with **DG DEFIS, which oversees the EU Space Programme and its components**. **ESA’s role as an entrusted entity** under the FFPA entails regular reporting and joint planning with DG DEFIS services, supported by a network of embedded advisors and liaison officers who facilitate real-time coordination across technical, financial, and political levels. Within this governance structure, an **Adviser for Relations with EUSPA and ESA**, positioned under the Deputy Director-General for Space Policy, Satellite Navigation and Earth Observation, ensures continuous alignment between the Commission’s space policy priorities and ESA’s implementation activities, acting as the institutional focal point for inter-organisational coordination.

Day-to-day relations between ESA and EU institutions are managed primarily through **ESA’s Directorate for Strategy, Legal and External Affairs (SLE)**, notably its **Office of EU Relations in Brussels**, which serves as the main liaison with the EU. At the Directors’ level, the **ESA–EU Matters Committee (EMC)**, chaired by D/SLE, coordinates the implementation of inter-institutional agreements—particularly the **FFPA**—and explores new areas of cooperation. The ESA Brussels Office acts as EMC Secretariat, and aims to ensure continuous communication between ESA Headquarters, EU institutions, and Member States’ representations. At the same time, **ESA-DG DEFIS programme teams** concretely collaborate in shared programmes (e.g., Galileo, Copernicus and IRIS²). These include joint or integrated programme teams.²⁴⁶ One example of such cooperation is the Joint Office on Galileo, where the Commission, ESA and EUSPA work together on programme implementation. “More recently, high-level exchanges between the Commissioner for Defence and Space, Andrius Kubilius, and the ESA Director General, Josef Aschbacher, have focused on advancing initiatives of strategic importance and strengthening coordination between the European Commission and ESA in the implementation of EU space

²⁴⁶ This is a joint office in the case of Galileo, and an integrated programme team in the case of IRIS2. There is no joint programme team for Copernicus.



programmes. Additional informal meetings are also taking place between the ESA Director General and relevant Commission Directorates-General (in particular, DG DEFIS) as well as between the relevant Directors.

Budgetary synergy between ESA and EU

Budgetary synergy between ESA and the EU has become a central element of Europe's space governance architecture. As highlighted in recent joint statements and high-level exchanges, both institutions are intensifying efforts to ensure that resources are efficiently allocated and actions are non-duplicative. This coordination is particularly important given the increasing scale of EU space ambitions and the growing interdependence between EU-funded flagship programmes and ESA Activities and Programme, and the complexity and flexibility resulting from the two funding schemes (three years for ESA, and seven years for the European Commission). This linkage was explicitly underscored during the opening of Commissioner Kubilius at the ESA CM25 in Bremen in November 2025, where he stressed the importance of coherence between ESA ministerial decisions and forthcoming EU MFF budgetary negotiation and planning. Its strategic value is already shown by the synergies between programmes such as ESA ERS and EU EO GS.²⁴⁷

²⁴⁷ European Commission. "Statement by Commissioner Kubilius at the Opening Session of the ESA Council Meeting at Ministerial Level - "Elevating the Future of Europe through Space." EC, 26 November 2025 (Link)



6 THE WAY FORWARD

The coming years will be decisive for the future of European space governance. The implementation of ESA CM25 outcomes, combined with preparations for the CM28 and negotiations on the MFF 2028–2034, will collectively shape the institutional and industrial landscape of Europe’s space sector, while also offering an opportunity to strengthen ESA–EU relations. In parallel, Member States are expanding their national space programmes, signalling a renewed political and strategic commitment to space. Germany’s recent announcement of a large-scale investment plan in space-related security and defence projects extending to 2030 illustrates this momentum and reflects a broader shift towards stronger national engagement within Europe’s evolving space landscape.²⁴⁸ However, the challenge ahead is not only financial, but also institutional.

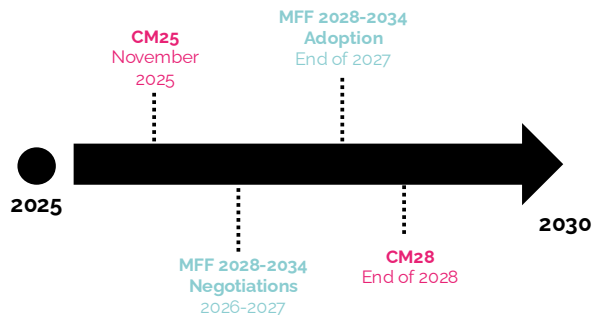


Figure 57: Next Institutional Milestones

ESPI perspectives on European space governance

The global space environment is undergoing rapid transformation, marked by commercial innovation, geopolitical competition, and accelerating technological cycles. For Europe to remain a leading actor, its governance must evolve accordingly. European space governance is inherently complex, involving multiple institutions, national agencies, and intergovernmental frameworks. The priority is to build a system that enables coherent collective action while safeguarding national sovereignty. Europe will need to strengthen coordination among the EU, ESA, and national actors, streamline decision-making processes, and secure renewed political commitment at the highest level. Closer alignment between the EU and ESA, enhanced coordination under the EU Space Programme, and more transparent industrial governance would contribute to this goal. At the same time, Europe must nurture a more open and competitive industrial ecosystem, encouraging innovation beyond established structures and ensuring that governance keeps pace with market and technological realities. Ultimately, Europe’s ability to remain a credible global space power will depend on its capacity to act collectively, think strategically, and modernise its institutional framework to meet the ambitions of the next decade.

²⁴⁸ Bundesministerium der Verteidigung. “Pistorius: ‘Im Weltraum sind China und Russland unsere direkten Nachbarn.’“ Pressemitteilung, 25 September 2025 (Link)



ANNEX A – KEY STAKEHOLDERS

European Space Agency Key Stakeholders²⁴⁹

Chairs and Vice-Chairs of Council at the Delegate Level		
Timeline	Chair	Vice Chair
2020 –2023	Anna Rathsman (SE)	Renato Krpoun (CH) Juan Carlos Cortés Pulido (ES)
2023-2025	Renato Krpoun (CH)	Juan Carlos Cortés Pulido (ES) Frank Monteny (BE)

List of ESA Senior Management	
Position	Name
Director General (DG) & Director General's Services	Josef Aschbacher
DG-Cabinet (DG-O)	Bianca Hoersch
Director Strategy, Legal and External Affairs (D/SLE)	Eric Morel de Westgaver
Director of Science (D/SCI)	Carole Mundell
Director of Human and Robotic Exploration (D/HRE)	Daniel Neuenschwander
Director of Space Transportation (D/STS)	Toni Tolker-Nielsen
Director of Earth Observation Programmes (D/EOP)	Simonetta Cheli
Director of Navigation (D/NAV)	Francico-Javier Benedicto Ruiz
Director of Connectivity and Secure Communications (D/CSC)	Laurent Jaffart
Director of Technology, Engineering and Quality (D/TEC)	Dietmar Pilz
Director of Operations (D/OPS)	Rolf Densing
Director of Commercialisation, Industry and Competitiveness (D/CIC)	Geraldine Naja
Director of Internal Services (D/HIF)	Marco Ferrazzani

Chairs and Vice-Chairs of Subordinate Bodies

Chairs and Vice-Chairs of Subordinate Bodies		
Body	Chair	Vice Chair
AFC	Paul Liias (EE)	Germana Spirito (IT)
IPC	Hendrik Verbeelen (BE)	Aleksandra Bukała (PL)
IRC	Hugo Costa (PT)	Silke Huettemann (DE)
OC	Christoph Jackwerth (AT)	
SEC	Birgitta Modig (SE)	Tiago Peres (PT)
SPC	Cecilia Hernández Rodríguez (ES)	Caroline Harper (UK)
JCB	Bert Meijvogel (NL)	Christian Hånberg (Sweden)

²⁴⁹ Updated as of October 2025



PB-STTS	Philippe PUJES (FR)	Joost CARPAY (NL)
PB-EO	Jarkko Koskinen (FI)	Thomas Ruwwe (DE)
PB-HME	Raffaele Mugnuolo (IT)	Jean Blouvac (FR)
PB-NAV	Kjell Arne Aarmo (NO)	Łukasz Maciak (PL)
PB-SSA	Mike Willis (UK)	Kirsti Kauristie (FI)

European Union Key Stakeholders²⁵⁰

European Commission	
Position	Name
President	Ursula von der Leyen
Commissioner for Space and Defence	Andrius Kubilius
Member of Cabinet of Commissioner for Space and Defence in charge of Space	Apostolia Karamali
Director General for DG DEFIS	Timo Pesonen
Deputy Director-General	Herald Ruijters (<i>acting</i>)
Adviser for Security of Information and Synergies between Space, Defence and Civil Industries	Christophe Morand
Director of the Directorate C (Secure and Connected Space)	Ekaterini Kavvada
Head of Unit C.1 (Secure Connectivity and Space Surveillance)	Jérémie Godet
Head of Unit C.2 (Space Single Market)	Zuzana Mazanova
Head of Unit C.3 (Space Economy)	Giancarlo Granero
Seconded Head of Unit from HADEA (Space Research)	Marko Curavic
Seconded Head of Unit from HADEA (Financial Support)	Maciej Gorka
Director of the Directorate D (Space Policy, Satellite Navigation and Earth Observation)	Christoph Kautz
Head of Unit D.1 (Space Policy)	Maria Fernandez Molinero
Head of Unit D.2 (Satellite Navigation)	Paul Flament
Head of the Unit D.3 (Earth Observation)	Mauro Facchini
Adviser for Relations with EUSPA and ESA	Thomas Husak

²⁵⁰ Updated to October 2025



EUSPA	
Position	Name
Executive Director	Rodrigo da Costa
Acting Chairman of the Administrative Board	Paul Liias
Chair of the Security Accreditation Board	Philippe Bertrand

European Parliament	
Position	Name
President	Roberta Metsola
Chair of ITRE Committee	Borys Budka (EPP)
Vice-Chair of ITRE Committee	Tsvetelina Penkova (S&D)
Vice-Chair of ITRE Committee	Elena Donazzan (ECR)
Vice-Chair of ITRE Committee	Giorgio Gori (S&D)
Vice-Chair of ITRE Committee	Yvan Verougtsraete (RE)
Chair of SEDE Committee	Marie-Agnes Strack-Zimmerman (RE)
Vice-Chair of SEDE Committee	Christophe Gomart (EPP)
Vice-Chair of SEDE Committee	Mihai Tudose (S&D)
Vice-Chair of SEDE Committee	Michał Dworczyk (ECR)
Vice-Chair of SEDE Committee	Riho Terras (EPP)
Co-Chair of Sky and Space Intergroup	Christophe Grudler (RE)
Co-Chair of Sky and Space Intergroup	Massimiliano Salini (EPP)

The European External Action Service (EEAS)	
Position	Name
High Representative for Foreign Affairs and Security Policy	Kaja Kallas
Secretariat General	Belén Martínez Carbonell
Deputy Secretary General for Peace, Security and Defence	Charles Fries
Director Security and Defence Policy	Maciej Stadejek
Head of Division & Special Envoy for Space	Marjolijn van Deelen

European Defence Agency (EDA)	
Position	Representative
High Representative for Foreign Affairs and Security Policy	Kaja Kallas
Chief Executive	André Denk

SatCen	
Position	Name
Director	Rear Admiral Louis Tillier
Deputy Director	Jorge Farré Basurte



Annex B - List of Abbreviations

Abbreviation	Full Name
ASI	Italian Space Agency
AFC	Administrative and Finance Committee
CFSP	Common and Foreign Security Policy
CNES	National Centre for Space Studies
COMPET	Competitiveness Council
COPUOS	Committee on the Peaceful Uses of Outer Space
CSDP	Common Security and Defence Policy
CSG	Guyana Space Centre
DLR	German Space Agency
EASA	European Union Aviation Safety Agency
ECF	European Competitiveness Fund
EDA	European Defence Agency
EDAP	European Defence Action Plan
EDF	European Defence Fund
EDIDP	European Defence Industrial Development Plan
EDIP	European Defence Investment Programme
EDIRPA	European Defence Industry Reinforcement through Common Procurement Act
EDTIB	European Defence Technological and Industrial Base
EEA	European Environment Agency
EEAS	European External Action Service
EIB	European Investment Bank
EIC	European Innovation Council
EIF	European Investment Fund
ELDO	European Launcher Development Organisation
EMSA	European Maritime Safety Agency
EO	Earth Observation
EOGS	Earth Observation Governmental Service
EPRS	European Parliamentary Research Service
ESA	European Space Agency
ESDP	European Security and Defence Policy
ESO	European Southern Observatory
ESRO	European Space Research Organisation
ESSP	European Satellite Service Provider
EU	European Union
EUMC	European Union Military Committee
EUMETSAT	European Organization for the Exploitation of Meteorological Satellites



EUMS	EU Military Staff
EUSPA	EU Agency for the Space Programme
FAC	Foreign Affairs Council
FFPA	Financial Framework Partnership Agreement
GDP	Gross Domestic Product
HADEA	Health and Digital Executive Agency
HLSPG	High-Level Space Policy Group
IGA	Intergovernmental Agreement
IMM	Intermediate Ministerial Meeting
IRC	International Relations Committee
ISS	International Space Station
ITRE	Committee on Industry, Research, and Energy
JCB	Joint Board on Communication Satellite Programme
JRC	Joint Research Centre
KASA	Korea Aerospace Administration
LEO	Low Earth Orbit
MFF	Multiannual Financial Framework
NASA	National Aeronautics and Space Administration
NATO	North Atlantic Treaty Organization
NEO	Near-Earth Objects
PERTE	Strategic Projects for Economic Recovery and Transformation
PNT	Positioning, Navigation and Timing
PSC	Political Security Committee
RRF	Recovery and Resilience Facility
SAB	Security Accreditation Board
SEC	Security Committee Security Committee
SEDE	Committee on Security and Defence
SPC	Science Programme Committee
SPEG	Space Policy Expert Group
SSA	Space Situational Awareness
SST	Space Surveillance and Tracking
STM	Space Traffic Management
STRA-X	Space Threat Response Architecture Exercise
SWE	Space Weather Event
TFEU	Treaty on the Functioning of the European Union
UN	United Nations



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Jean-Christophe Gros	EU Programme Coordinator ESA	European Space Agency
Gábor Zsolt Pataki	Head of Service (STOA)	European Parliamentary Research Service (EPRS)
Regina Peldszus	Specialist (Space Security)	European External Action Service
Salvatore Pignataro	Space Attaché	Council of the EU
Milan Seghier	Space Policy Officer	European Defence Agency
Juan Luis Valero	Head of Brussels Office	SatCen

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