



Brussels, 5 May 2017
(OR. en)

8489/17

ESPACE 21
RECH 111
COMPET 270
IND 90
EU-GNSS 20
TRANS 152
TELECOM 90
MI 350
EMPL 212
CSDP/PSDC 210
CFSP/PESC 353

NOTE

From: Presidency
To: Permanent Representatives Committee/Council
Subject: *Preparation of the Council ("Competitiveness") of 30 May 2017*
Space Strategy for Europe:
"Space Strategy for Europe Implementation"
- Exchange of views

I. INTRODUCTION

1. Building on the momentum of its Conclusions adopted in 2011¹, 2013² and 2014³ under the Hungarian, Irish and Greek Presidencies respectively, in 2014, under the Italian Presidency⁴, the Council provided political orientations towards the definition of a long-term European space vision and invited the Commission to report by 2016.

¹ Doc. 10901/11 - Council Conclusions on "Towards a space strategy for the European Union that benefits its citizens"

² Doc. 10295/13 - Council Conclusions on "EU Space Industrial Policy - Releasing the potential for economic growth in the space sector"

³ Doc. 10289/14 - Council Conclusions on "Towards a shared EU-ESA vision for space fostering competitiveness"

⁴ Doc. 15396/14 Exchange of views on " "The competitiveness of the European space sector as a key driver for the European economy", and doc. 16502/14 - Council Conclusions on "Underpinning the European space renaissance: orientations and future challenges".

2. In 2015 and 2016, the Council continued the debate in the broader context set in 2014. Two informal meetings of EU and European Space Agency (ESA) Ministers in charge of Space were held, in November 2015 under the Luxembourgish Presidency and in May 2016 under the Dutch Presidency respectively. The latter also initiated a policy debate on the uptake of space data which was continued by the Slovak Presidency.
3. On 26 October 2016, the Commission issued its Communication on "A Space Strategy for Europe" (hereinafter SSE), in order to foster new services and to promote Europe's leadership in space. The SSE is articulated around four strategic goals: 1) Maximising benefits of space for society and the EU economy, 2) Fostering a globally competitive and innovative European Space sector, 3) Reinforcing Europe's autonomy in accessing and using space in a secure and safe environment, and 4) Strengthening Europe's role as a global actor in space and promoting international cooperation.
4. In the afternoon of 26 October 2016 and in conjunction with the publication of the SSE, a Joint Statement EU-ESA on "Shared Vision and Goals for the Future of Europe in Space" was signed by the Commission on behalf of the EU and by ESA following endorsement by the COREPER on 12 October 2016⁵. The purpose of this Joint Statement was to emphasise the intention of the EU and ESA to reinforce their cooperation in the future and further develop it, in order to achieve their common ambition and goals for Europe to remain a world-class actor in space and a partner of choice on the international scene.
5. The Slovak Presidency organised an exchange of views on the SSE on 29 November 2016⁶.
6. In its Work Programme 2017⁷, the Commission announced as a follow-up to the European Defence Action Plan and the SSE, its intention to put forward in 2017 an initiative to ensure reliable, secure and cost-effective satellite communication services for public authorities (GOVSATCOM – governmental satellite communication) as well as measures to facilitate market uptake of space services and data.

⁵ Doc. 12808/1/16

⁶ 14212/16 + COR 1

⁷ COM(2016) 710 final of 25.10.2016

7. In 2017, under the Maltese Presidency, the Space Working Party examined the text of draft Council Conclusions on SSE during its meetings of 16 February, 20 March and 6 April 2017. In addition, at the request of the Space WP the Commission provided information on the state of implementation of the SSE in general and of its specific objectives in particular, including specific information on some of the related initiatives listed in the Commission's Work Programme 2017.

II. BACKGROUND

Union's achievements in space policy

8. The EU's role in the area of space has evolved in the last decade into a responsibility for delivering large-scale infrastructure programmes and a shared competence in space in order to promote scientific and technical progress, industrial competitiveness and the implementation of the Union policies. This evolution was accompanied by a significant increase in the budget allocated to Union programmes in the last two multiannual financial frameworks with a global envelope of over €5 billion during and €12 billion during 2007-2013 and 2014-2020 respectively.
9. This has led to the establishment of the EU flagship programmes, EU GNSS⁸ and Copernicus, allowing them to reach operational capability. The foundations for the protection of EU space systems have also been set through the Space Surveillance and Tracking (SST) support framework. Union research and innovation programmes, including Horizon 2020, have increasingly underpinned research and innovation actions regarding strategic priorities for space. European investments in space have been driven by political ambition for autonomous access to space and a sustained effort to develop scientific, technological, industrial and security breakthroughs opting for targeted international co-operation with leading space powers.

⁸ Galileo and EGNOS which together form the European Global Navigation Satellite Systems (EU GNSS).

10. Space has become an instrument for the achievement of Union's objectives and a Union's policy in its own right. Space programmes have proven to be an invaluable tool for the implementation of numerous Union policies and for directly addressing the needs of European citizens as well as maximising the benefits for society as a whole.

A fast-evolving space context

11. At the same time, the global context is evolving fast and competition is building up. The space sector is undergoing transformation and transition, evolving from historically purely public-funded activities to a domain driven more and more by private investments motivated by commercial interests.
12. Looking ahead in the decades to come, the challenge the Union is called to tackle is to unleash the economic opportunity gradually unfolding for space as a market sector on its own, an enabler for growth and jobs as well as for fostering a competitive European industrial basis. Therefore, the Union needs to ensure sustainable and operational infrastructures as well as the deployments of targeted capacity building measures, as appropriate, in order to feed the whole space economy and ecosystem in its growth-oriented policies in order to foster entrepreneurship and a thriving business environment.

Towards a European space roadmap

13. The definition of a SSE, as proposed by the Commission and complemented by the response of the other institutions, notably the Council and the European Parliament, sets a European vision and lends itself as the blueprint of actions for the years to come. It should be translated into a coherent set of space programmes and activities addressing Earth observation, satellite navigation and satellite communications as well as research, access to space and space situational awareness allowing for a strategic approach that provides long-term continuity to the space sector.

14. Europe needs to consistently achieve maximum complementarity and transparency among Union space-related programmes as well as activities undertaken by other relevant European actors. In this context, the time is now ripe to deliver, consolidate and expand through a partnership approach. The strengths of all relevant European actors⁹ need to be bonded together to mitigate any risks linked to fragmentation in order to maintain and enhance Europe's global leading position in the space sector.
15. Space systems are strategic assets. Initially developed as defence or scientific projects, they now also provide commercial infrastructures on which important sectors of the economy depend and which are relevant in the daily life of citizens. Accordingly, the Union needs to ensure the reliable continuity of its strategic assets by following a strategic European roadmap while allowing for an inclusive approach towards emerging actors.

III. QUESTIONS FOR THE POLICY DEBATE:

In the light of the overall context described above, the Presidency invites the Council (Competitiveness – Space part) on 30 May 2017 to address the following questions:

- 1) Taking stock of the Union's achievements in space and considering the increasingly complex global geopolitical context, including economic, security and environmental aspects, how should Europe best tackle the rising challenges? What do Member States consider to be the most important focus at both Union and national levels?

⁹ European actors include notably the Member States and ESA but also Union agencies, such as the European GNSS Agency (GSA), the European Environmental Agency (EEA), the European Maritime Safety Agency (EMSA), the European Agency for the Management of Operational Cooperation at the External Borders of the Member States of the European Union (FRONTEX), the Union Satellite Centre (SATCEN) as well as intergovernmental organisations, such as the European Agency for Meteorological Satellites (EUMETSAT) and the European Centre for Medium-range Weather Forecasting (ECMWF).

- 2) Considering the long cycles of space systems, what would be the appropriate timeliness for European actions aimed at ensuring continuity and long-term visibility of the space sector and possible other market sectors that could use space to enable new solutions?
 - 3) In view of the EU-ESA joint statement on possible roles and responsibilities for the Union, ESA and their Member States, what are the best ways to achieve complementarity among all relevant European actors, avoid fragmentation, maintain and enhance the European leading position at global level? What actions can Member States take in that respect?
 - 4) What capacity building measures shall be taken to particularly assist Member States and regions with emerging space capabilities? How to engage a wider participation of SMEs, microenterprises and users from society?
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