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From: General Secretariat of the Council
To: Permanent Representatives Committee/Council

Subject: *Preparation of the Council (Competitiveness (Internal Market, Industry, Research and Space) on 22-23 May 2023*
EU Space Policy in a new geopolitical landscape
- *Policy debate*

Delegations will find attached a Presidency note on "EU Space Policy in a new geopolitical landscape" with a view to the policy debate at the Competitiveness Council on 23 May 2023.

EU Space Policy in a new geopolitical landscape

Policy debate

Space in a changed geopolitical landscape

European dependence on space systems and services for solving societal challenges and succeeding with a green and digital transformation is growing. Public and commercial space-based services are becoming an indispensable part of the daily lives and activities of citizens and companies. Recent technological development has made access to space possible for more categories of actors than before when mainly government-funded institutional entities could access space. The space domain encompasses any element relevant to the functioning of space systems, including the ground and space segments, the launch of infrastructure and operations, space objects, radio frequency links, user terminals as well as information and data supplied by these.

The development of the so-called New Space represents an unprecedented opportunity for the European space sector and is expected to contribute to increased innovation, economic growth and the creation of jobs. However, a significant dependency on space-based services also entails greater vulnerability. Space systems are under increased threat of intentionally hostile activities through counterspace capabilities. At the same time, the regulations for the Union Space Programme and the Union Secure Connectivity Programme (IRIS2) are under civil control.

EU Space Strategy for Security and Defence

The European Commission and the High Representative of the European Union for Foreign Affairs and Security Policy presented a joint communication, the *European Union Space Strategy for Security and Defence*, on 10 March 2023. It states that space is an increasingly contested area and that some space powers have the capabilities to target critical space infrastructure. As a global space power, the EU is increasingly dependent on space-related services and data, and therefore the importance of ensuring the resilience and protection of EU space systems is emphasised in the strategy. To this end, the Commission and the European External Action Service (EEAS) propose various measures to address the related challenges. They include:

- the establishment of an Information Sharing and Analysis Centre;
- a forthcoming Commission proposal for an EU Space Law;
- a roadmap for reducing strategic dependencies on technologies of fundamental importance to the EU Space Programme;
- the application of EU broader initiatives to ensure the security of supply;
- preparatory actions to safeguard long-term access to space; and
- an ambition to develop cooperation with likeminded partners, including with NATO and the US.

In addition, the strategy aims to enhance the use of space for security and defence through more systematic cross-fertilisation between EU space, defence and security initiatives. It will include the development of dual-use capabilities and services by embedding long-term defence requirements for space-based services in the design of new systems as well as when upgrading relevant existing systems, including for the EU Space Programme.

Union Space Programme components

The EU Space Programme consists of systems for: i) Positioning, Navigation and Timing (Galileo and EGNOS), ii) Earth Observation (Copernicus), iii) Space Surveillance and Tracking and Space Situational Awareness, and iv) GOVSATCOM.

In addition, the European Parliament and the Council recently adopted a regulation establishing the IRIS2.

From the outset, a vital aspect of these programmes has been civilian control and use; for example, Galileo is the first global GNSS system under civilian control unlike the American GPS. Another important policy objective has been to meet the public sector's needs for accurate earth observation data and GNSS services, for example via Galileo PRS. In addition, there has been a strong focus on maximising socio-economic returns from the programmes enhancing its market uptake and through research and development activities relating to the downstream sector. Although the Copernicus services are conceived primarily for the benefit of Europeans, worldwide and freely available data creates collaboration opportunities for EU businesses and academics and contributes to an effective European space ecosystem. Another policy objective has been to ensure the competitiveness of the European space industry and other business opportunities arising from space activities.

Questions for discussion

In view of current global developments, an increased focus on synergies with security and defence is incontestable. However, the civilian nature of the EU Space Programmes remains at the heart of European space policy. The Presidency therefore would like to address the following issues:

1. How will the EU Space Strategy for Security and Defence influence the implementation of the current Space Programmes?
2. What synergies could be obtained while safeguarding the space programmes' policy objectives?