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NOTE

From:	General Secretariat of the Council
To:	Delegations
Subject:	Commission's intention to enter into a Declaration on behalf of the European Union on a Long-Term Vision for European Space Transportation with EU Member States, the European Space Agency (ESA) and ESA Member States

Delegations will find attached the above-mentioned non-binding instrument.

A Long-term Vision for European Space Transportation

1. INTRODUCTION

We need a forward-looking Long-term Vision to shape Europe's transportation to, in and from space. This Vision builds on the ambitions of European public players – namely the European Commission, the European Space Agency (ESA) and all their respective Member States – in space. It outlines shared challenges, opportunities and strategic priorities to ensure that Europe remains a competitive, autonomous, self-reliant, innovative and secure player in a changing global context. Without prejudice to the competences defined in the EU Treaties and in international and intergovernmental agreements, the Vision should provide strategic guidance to European policymakers supporting autonomous, resilient, and competitive space transportation services in Europe.

The European space transportation landscape is at a pivotal crossroad. Ariane 6 and Vega C restored Europe's autonomous access to space. Together with emerging solutions led by private actors, the new landscape heralds a new era for access to space in Europe. However, the launcher sector faces mounting pressures. Global demand for launch services is increasing, including from the European public sector, albeit at varying regional rates, with Europe experiencing a limited growth compared to other spacefaring nations. At the same time, global competition is intensifying. Launch service providers worldwide are often benefitting from captive markets and backed by national governments. Furthermore, geopolitical instabilities, supply chains disruptions, capability and technology gaps and external dependencies further complicate the path forward in Europe.

Over the past years, on top of the technology-driven approach, European public players have paved the way for a paradigm shift towards a more commercially- driven, service-led and anchor-customer oriented procurement approach.

In this context, we aim to foster strategic collaboration among public players towards an autonomous, more affordable and competitive European space transportation sector. While remaining sovereign in our respective roles and actions, we recognize that no single entity or country can address the identified challenges alone and that all European public players should work together in implementing this Vision.

2. VISION STATEMENT

By 2045, Europe will offer a wide range of services supported by coherent long-term public policies that guarantee **autonomous, reliable and cost-effective access to space for the needs of public institutions**, backed by robust launch capabilities and institutional demand, while offering competitive prices on the commercial market and aiming at a long-term economic sustainability of services. Balancing fair competition and cooperation in a unique model, while supporting disruptive innovation, Europe will benefit from multiple solutions enabling its space ambitions. Thanks to a **competitive and resilient industrial ecosystem**, Europe will strengthen its position as a major spacefaring actor to launch and transport spacecraft to, in and from space.

Therefore, **this Vision is a call for action**, inviting all stakeholders to co-create a future where European space transportation services thrive as a cornerstone of Europe's strategic autonomy, resilience and competitiveness.

3. POLITICAL PRIORITIES

This Vision is based on mid- and long-term priorities to guide future European space transportation strategies and action plans supported by European public players under their respective competences and initiatives.

Mid-term priorities: Resilience

- **European preference for European launch services.** We will prioritise the use of cost-effective European solutions launched from the European territory^{i*} while supporting cooperation and competition for intra-European procurement for institutional missions, fostering a level playing field, reducing non-European dependencies, also in the supply chain, and strengthening sustainability, resilience and European strategic autonomy.
- **Availability and cost-effectiveness of operational European launch services, including ground infrastructure, from the European territory*.** We will accompany the European industry towards effective cost reduction and sustainable launch services, in line with the projected launch needs. To serve Europe's institutional needs, enhance its resilience and strategic autonomy, we will foster the emergence and maturation of more commercially-driven solutions, while allowing consolidation to be market-driven, also leveraging on global accessible markets, for European launcher systems, spaceports and other critical ground infrastructure.
- **Precursor disruptive transportation solutions.** We will foster a European space industry that develops innovation from concepts to demonstrators for New Space transportation solutions to, in and from space.

Long-term priorities: Competitiveness

- **A new customer-driven exploitation model aimed at minimising public support to European launch services** through cost-effective services and institutional customers covering the actual cost of their own launch services with European preference as a baseline for strategic autonomy.
- **Entry into operation of new sustainable space transportation services to, in and from space.** Through the operation of a variety of innovative and competitive services, European companies will be globally more competitive while serving Europe's institutional needs.

- **Disruptive transportation solutions for European ambitions to enable future missions and emerging space economy opportunities**, through support for game-changing innovation for future transportation solutions, enabling potential new space ambitions and capitalising on the growing space economy.

4. IMPLEMENTATION PRINCIPLES

The Vision will be implemented in line with three leading principles; these principles regard the role of the European public players, the resources to be used and the cooperation required for its successful implementation.

Role of European public players

Within their respective responsibilities, European public players need to serve as a catalyst for innovation and market growth, capitalising on ESA's long-standing programmatic and technical expertise in space transportation. They should contribute through six main ways:

- **First, by consolidating public-sector launch services demand** in order to support the creation of a more unified European market that reduces fragmentation and strengthens predictability, in particular, through improved visibility and coordination of institutional demand among European public actors.
- **Second, by promoting and adequately supporting European preference, with adequate support measures**, to strengthen competitive European industrial capabilities and launch services.
- **Third, by acting as anchor customers** to reduce financial risks, and promote multiple solutions.
- **Fourth, by following a service-led and end-to-end innovation approach** that complements a technology-driven approach to better respond to end users' needs.
- **Fifth, by promoting private investments** that enable commercial companies to scale operations.
- **Sixth**, through space diplomacy, Europe should be positioned as a trusted, open and global partner in space transportation, expanding international cooperation and commercial reach.

Resources

European public players should coordinate and mobilize their respective programmes, instruments and resources, on a voluntary basis, in line with their respective legal frameworks, to support the implementation of this Vision, maximising efficiency and avoiding duplication.

Cooperation, coordination and synergies

Cooperation and coordination across European public players should rely on a structured, transparent, inclusive and dedicated mechanism while respecting the complementary roles of the EU, ESA and their respective Member States. European public players should further coordinate strategies, action plans and initiatives, and foster joint/coordinated actions and synergies.

By encouraging European cooperation of public players, this Vision will **foster public efficiency** towards autonomous, resilient and competitive space transportation services in Europe, while strengthening Europe's technological and industrial base.

^{i *} The notion of European territory shall be understood as including the respective Member States of the EU and ESA.