ESPI

8th Prague Space Security Conference

What Is To Be Done? Public Sector Leadership

PANEL 5 – INTRODUCTORY REMARKS

H. LUDWIG MOELLER – Director of ESPI

JUNE 2025

IT TAKES A VILLAGE

ESPI European Space Policy Institute

Latest releases of comprehensive national strategic documents dealing with space

Multiplication of space defence strategies and Space Commands in Europe

SCALING EUROPEAN AMBITION

Macron

3% of Europe's GDP on research, to foster Europe's leadership in five emerging and strategic sectors

Status quo USA

Currently at the level of 0,24% of U.S. GDP, majority originating in defence & intelligence

Status quo Europe

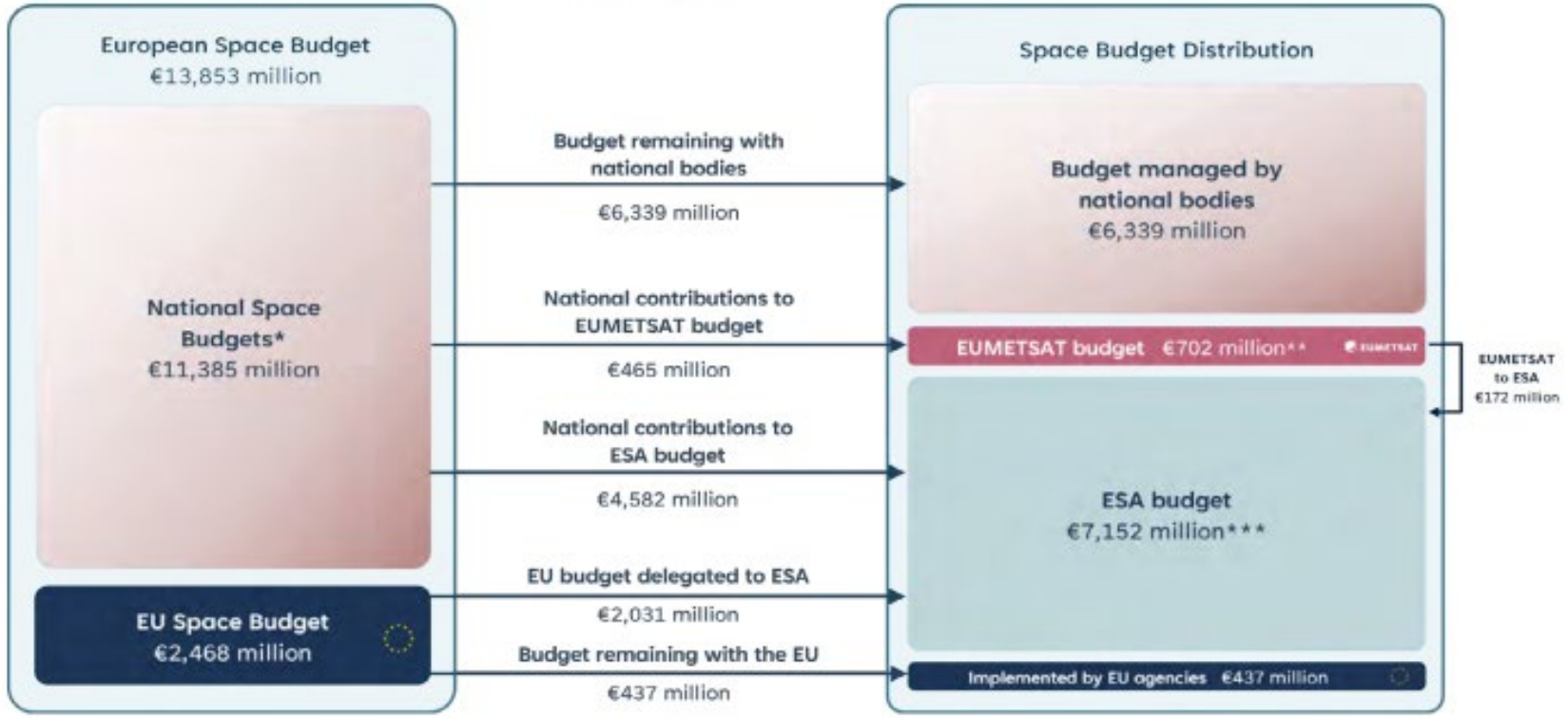
Currently at the level of 0,07% of Europe's GDP

ESPI 2040 vision

European public space budget at 0,15% share of Europe's GDP

Data Sources: ESPI, Euroconsult, IMF, ESA, EUMETSAT

Consolidated European space budget in 2022



* National Space Budgets include all budgets of EU and ESA member states excluding Canada

** EUMETSAT budget includes €237 million from other sources including the contribution from Turkey

*** ESA budget includes €367 million from other sources including the contribution from Canada

SPACE FOR POLICY

The Case of foreign, security and defence policies

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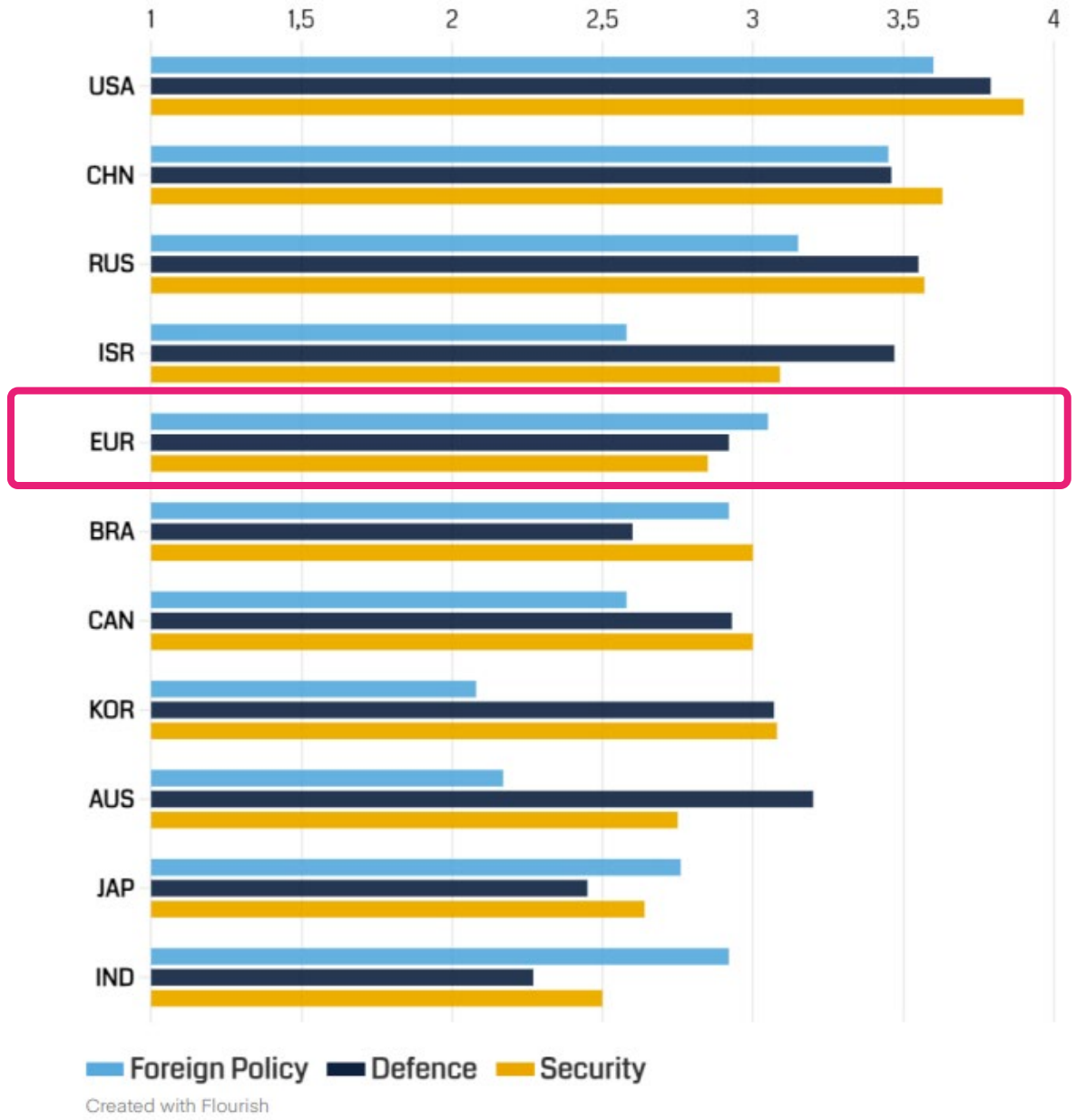


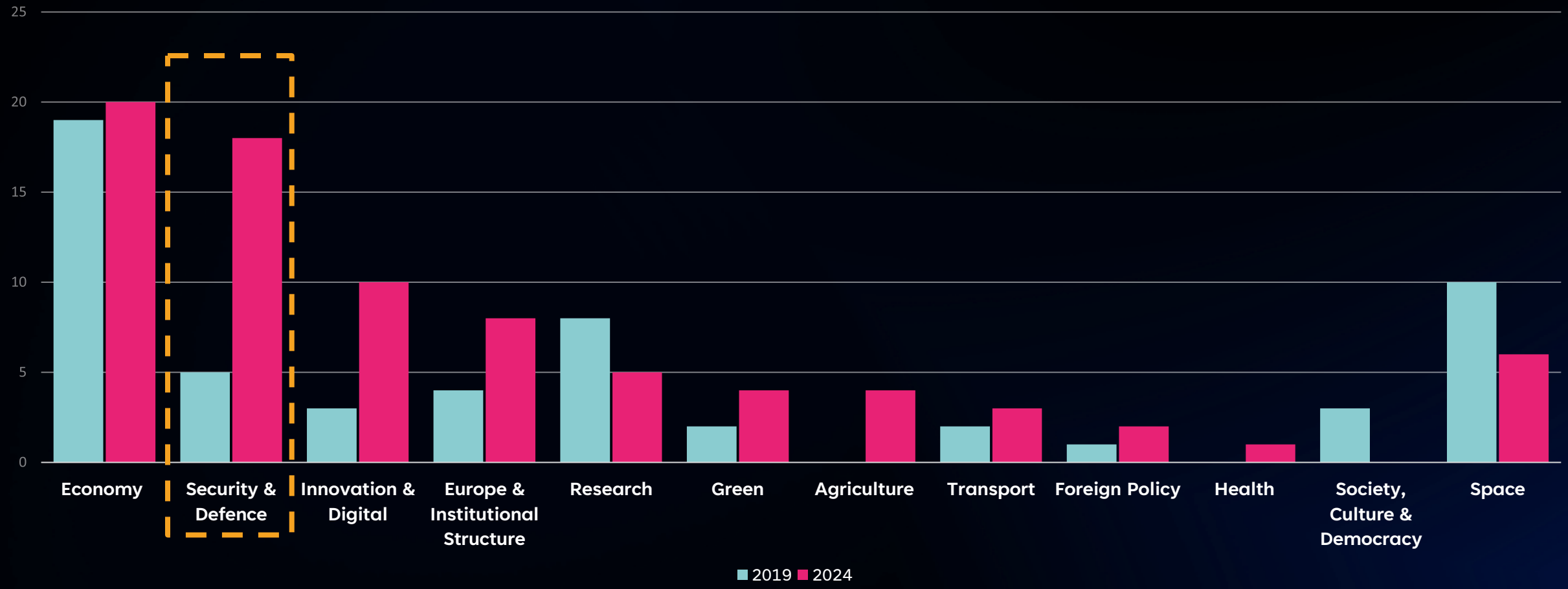
Source: Power, State and Space: Conceptualizing, Measuring and Comparing Space Actors

FRAMING OF SPACE IN EU ELECTIONS

ESPI

Space increasingly is seen as an enabler of many policy sectors

+ 41% *surge in space-related references in 2024 EU elections compared to 2019 across party manifestos.*



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Source: Will Space Sit in the European Parliament? Advancing Space Policy in the European Political Debate (ESPI Report 92)

Space Defense and Security

Global Government Expenditures for Space Defense and Security in 2023

Top countries

- $39B United States
- $8.8B China
- $2.6B Russia
- $1.3B France
- +$1B
- $686M Japan
- $661M United Kingdom
- $660M European Union
- $516M Germany
- +$500M

$18.8B
Intelligence, Surveillance and Reconnaissance (ISR)

$19.7B
Others (SIGINT, EW/MD, Space Logistics...)

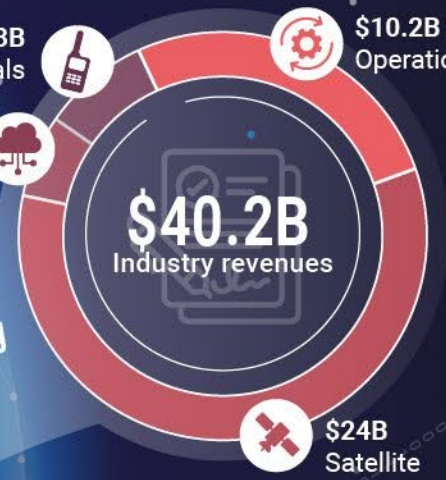
$4.3B
Space Domain Awareness (SDA)

$5B
Positioning, Navigation and Timing (PNT)

$10.6B
Secured Satellite Communications

Contracted to industry

2023 industry revenues by value chain segment



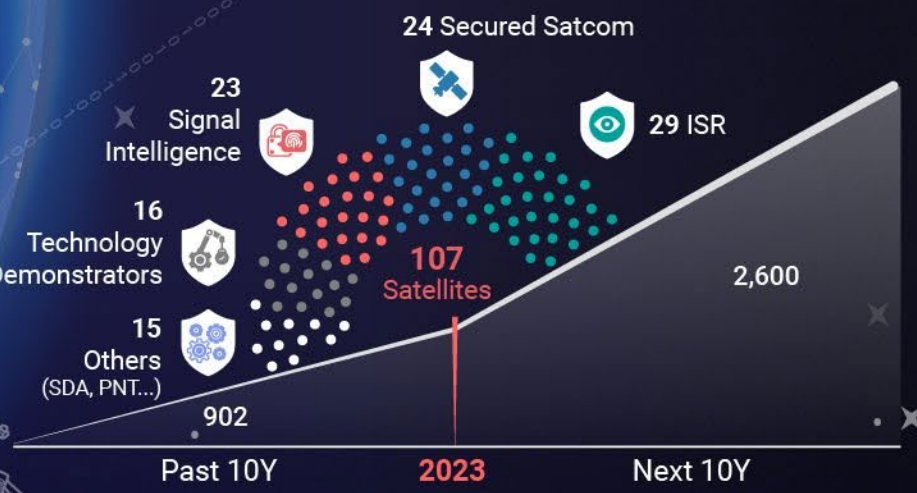
$3.3B User Terminals

$10.2B Operations

$2.7B Services

$24B Satellite

More than 100 defense satellites launched in 2023



Source : Euroconsult, Space Defense and Security 2024 Edition

NOVASPACE
Merger of Euroconsult Group and SpaceTec Partners

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THE TIME IS NOW.

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