

Brussels, 14 November 2024
(OR. en)

15017/24

ESPACE 92	TELECOM 311
RECH 474	MI 887
COMPET 1051	ENER 525
IND 495	EMPL 541
EU-GNSS 20	CSC 628
TRANS 457	CSCGNSS 8
AVIATION 149	CSDP/PSDC 754
MAR 184	CFSP/PESC 1500

NOTE

From: General Secretariat of the Council

To: Permanent Representatives Committee/Council

Subject: *Preparation of the Council (Competitiveness (Internal Market, Industry, Research and Space)) on 28-29 November 2024*
Draft Council conclusions on the interim evaluation of the European Union's Space Programme
- Approval

I. INTRODUCTION

1. The Council conclusions on “The interim evaluation of the European Union’s Space Programme” have been prepared with a view to their approval at the Competitiveness Council (Space) of 29 November 2024. The conclusions consider the findings of the Commission Report on the Implementation of the EU Space Programme and on the performance of the European Union Agency for the Space programme (EUSPA) of July 2024.

2. The Presidency has put forward these draft Council conclusions in order to take stock of the progress made in the EU Space Programme implementation and by the EU Agency for the Space Programme (EUSPA), while highlighting the recurrent issue of access to space and the work remaining ahead. The conclusions urge for action against the growing threats to the safety and resilience of the Programme and call for reduced dependency and for strengthened autonomy.

II. STATE OF PLAY

3. The Space Working Party examined the draft Council conclusions on three occasions since 9 September 2024.
4. The text presented in the Annex to this Note is identical to the text circulated after the last Space Working Party meeting on this topic in doc. 14530/1/24 REV 1, that raised no comments from delegations. It represents an overall balanced package which could allow for its approval by the Council.

III. CONCLUSION

5. The Permanent Representatives Committee is invited to confirm the compromise text set out in the Annex to this Note and submit the draft conclusions for approval by the Council (Competitiveness) at its session on 29 November 2024.

**DRAFT COUNCIL CONCLUSIONS ON THE INTERIM EVALUATION OF THE
EUROPEAN UNION'S SPACE PROGRAMME**

THE COUNCIL OF THE EUROPEAN UNION

RECALLING

- A. Regulation (EU) 2021/696 establishing the EU Space Programme, which unites all EU space activities in one comprehensive regulatory framework.
- B. Council conclusions on “Copernicus by 2035”¹.
- C. Council conclusions on “an EU approach to space traffic management”².
- D. Council conclusions of 14 November 2023 on the EU Space Strategy for Security and Defence³.
- E. Council conclusions of 23 May 2024 on strengthening Europe’s competitiveness through space⁴.
- F. The Strategic Agenda 2024-2029 annexed to the European Council conclusions of June 2024⁵

1 Doc. 10070/22.
2 Doc. 10071/22.
3 Doc. 14512/23.
4 Doc. 10142/24.
5 Doc. EUCO 15/24.

INTRODUCTION

1. WELCOMES the European Commission’s Report on the “Implementation of the EU Space Programme and the Performance of the European Union Agency for the Space Programme (EUSPA)” (Interim Evaluation) as provided for in Article 102(1) of the Regulation (EU) 2021/696.
2. RECOGNISES the progress made since the implementation of the Programme started in 2021, particularly in consolidating the various EU space activities under a single regulatory framework, significantly enhancing the coherence, efficiency, and strategic impact of the EU’s space-related initiatives.
3. WELCOMES the successful implementation of the flagships of the Programme, Copernicus, Galileo and EGNOS which have met their key performance indicators and consistently providing state-of-the-art services essential for various sectors across the EU.
4. ACKNOWLEDGES the timely advances in new initiatives such as GOVSATCOM and Space Situational Awareness (SSA) contributing to the EU’s strategic autonomy in an open economy and its resilience in an increasingly congested and contested space environment.
5. NOTES that the operational phase of GOVSATCOM activity and Space Weather (SWE) and Near-Earth Objects (NEO) of the SSA component commenced only towards the end of the evaluation period set to be concluded on 30 June 2024 by the Regulation, challenging the feasibility of a robust evaluation for these components, in particular a cost-benefit analysis.
6. RECOGNISES that despite the challenging global context, including geopolitical tensions, supply chain disruptions, and the impacts of the COVID-19 pandemic, the Programme has maintained its overall trajectory of success and started integrating new components in an appropriate manner.

7. WELCOMES the efforts of all entities involved, including the European Commission, EUSPA, the European Space Agency (ESA), other entrusted entities and the EU Member States, in ensuring the Programme's steady progress, highlighting the importance of close collaboration in achieving its objectives.
8. NOTES with satisfaction the Programme's contribution to the EU's strategic priorities, particularly in supporting the goals of the green and digital transitions and the EU strategic autonomy and resilience via the integration and enhancement of Copernicus, Galileo and EGNOS data in EU policies such as climate, biodiversity and ocean monitoring, transportation or agriculture, and the successful launch of GOVSATCOM's preparatory activities.
9. RECOGNISES these milestones as evidence of the Programme's growing maturity and its essential role in promoting the Union as a global actor in the space sector and in ensuring that the EU remains at the forefront of space innovation and capability.

STRATEGIC OBJECTIVES AND SOCIO-ECONOMIC BENEFITS

10. WELCOMES the Programme's role in enhancing the EU's resilience and strategic autonomy in an open economy, as well as its contribution to reducing dependences on non-European space systems ensuring that the EU remains self-reliant in critical areas such as satellite navigation, positioning and timing, and Earth observation while maintaining the EU's ability to operate independently on the global stage, and the growing capacities in SSA and Space Surveillance and Tracking (SST), particularly in an increasingly contested and competitive space environment.
11. HIGHLIGHTS the dual-use potential of some space components and ACKNOWLEDGES the desirability, where appropriate, and while respecting the competence of Member States and the programme's civil nature, of taking into account governmental needs and requirements.

12. RECOGNISES the impetus generated by the Programme in developing new markets and opportunities for enterprises, particularly small and medium-sized enterprises (SMEs), start-ups and scale-ups, fostering research, innovation and technological development, creating new business opportunities across the EU, strengthening the EU's space industry, and contributing to the renewal of a skilled workforce, all of which boosts the broader economic growth of the Union.
13. RECOGNISES that the socio-economic benefits of the implemented Programme are proportionate to the full realisation and widespread use of the services and data generated by the Programme and UNDERLINES the importance of focusing on and enhancing user uptake of all Programme components through a strategic approach and initiatives, for both space and non-space sectors.

PROGRAMME IMPLEMENTATION

14. ACKNOWLEDGES the positive development of the Copernicus component, which has exceeded its performance targets, including those for data and services reliability and continuity, despite the set-backs caused by the missing data from the Sentinel-1 B; RECOGNISES that the number of users of Copernicus data and services continues to grow, reflecting the increasing importance and utility of the information provided in meeting the needs of its users and supporting EU policies, notably the EU Green Deal.
15. NOTES that the current pricing policy of the Programme, particularly the free, full and open data policy of Copernicus, has proven effective in supporting innovation and wide usage across multiple sectors, and NOTES, however, the limitations of the existing data sharing and licensing model when acquiring data from commercial sources.
16. NOTES the assessment for developing a potential new EU Earth Observation governmental service that would complement existing and planned capabilities and, respond to identified needs, including where appropriate enhancing support for security and defence.

17. WELCOMES the overall performance of Galileo and the declaration of new services such as the High Accuracy Service (HAS), which significantly enhances the precision of Galileo, and WELCOMES the initial broadcasting of the Public Regulated Service (PRS) and the Open Service Navigation Message Authentication (OSNMA) in anticipation of service declaration, with a view to providing critical benefits to both the governmental and private sectors, including transportation, agriculture, emergency management, safety, security and defence. NOTES with concern the increased occurrences of spoofing and jamming.
18. REGRETS that Galileo's Open Service Full Operational Capability (FOC) and Public Regulated Service Initial Operational Capability (IOC) has yet to be achieved, partly due to issues related to launch services, EMPHASISES that such issues pose potential risks to the continuity and quality of Galileo services and CALLS FOR the continued enhancement of quality and security management within the programme; therefore, URGES the Commission to prioritise the deployment of satellites, address challenges, and ensure the long-term maintenance of the Galileo service performance.
19. ACKNOWLEDGES that while EGNOS has significantly improved the accuracy and reliability of satellite navigation over Europe, there remain some gaps in coverage, CALLS UPON the Commission to address these coverage gaps and to ensure continuous and safe operations during the deployment of EGNOS V3, and to adapt the EGNOS system to the requirements of other major users.
20. WELCOMES the successful achievements of the Space Surveillance and Tracking (SST) services under the SSA component, especially the increasing participation of Member States and the growing number of registered organisations and satellites, reflecting the Programme's success in enhancing space situational awareness within the EU, and in promoting a global coordination between existing and developing space surveillance and tracking systems in various regions around the world.

21. UNDERLINES the need to modernize and strengthen the EU's Space Surveillance and Tracking (SST) infrastructure to improve its ability to survey and track space objects and debris and therefore CALLS UPON the Commission and Member States to continue the enhancement of SST capabilities to ensure a robust and resilient system for space situational awareness.
22. UNDERLINES the importance of the ongoing analysis of the Space Weather (SWE) service requirements under Article 60 of the EU Space Regulation. Furthermore, ACKNOWLEDGES the effective implementation of the entrusted tasks by the European Space Agency (ESA) in this field as well as in the area of the Near-Earth Objects (NEO).
23. NOTES the ongoing implementation of preparatory activities for service provision under the GOVSATCOM initiative, including the Hub infrastructure procurement process, and the mitigation of initial delays, demonstrating the Programme's potential capacity to deliver critical secure communication services vital for missions and operations of the Union and its Member States, in particular safety and security critical missions.
24. UNDERLINES the complementarity of the GOVSATCOM component with the Union's Secure Connectivity Programme, IRIS², ensuring a comprehensive, cost-effective and efficient alignment with the EU's secure communication needs including global coverage.

EUSPA

25. WELCOMES the evolution of the European GNSS Agency (GSA) into the European Union Agency for the Space Programme (EUSPA) as a significant step in enhancing the governance and management of the Programme and of the operational system of the Programme and its components. At the same time RECOGNISES the agility demonstrated by EUSPA in undertaking new tasks and adapting to new responsibilities and challenges.

26. WELCOMES the EUSPA's overall performance in managing the core and entrusted tasks under the EU Space Programme and the Agency's efforts which have been instrumental in ensuring effective delivery of services and secure management of space assets, and in promoting innovation and market uptake within the EU space sector; WELCOMES the fact that the independence and autonomy of the Security Accreditation Board has been ensured.
27. UNDERLINES the role of the EUSPA as the space security monitoring structure of the EU Space Programme, WELCOMES the Commission action plan to mitigate the current limitations of Galileo security monitoring system and, STRESSES the need to strengthen the operational security of EU satellite systems, including the EUSPA's key role in this regard.

LESSONS LEARNT AND OUTLOOK

28. EMPHASISES the urgent need to address the growing threats to the safety and resilience of the Space Programme in view of increasing cybersecurity risks, radiofrequency interferences, solar activity and collision risks; and STRESSES that decisive action is required to ensure the long-term sustainability of space activities.
29. ACKNOWLEDGES the need to reduce the EU Space Programme's dependence on third countries, which is particularly important in critical areas such as access to raw materials, components, and services and WELCOMES the activities of the Observatory of Critical Technologies and the Joint Task Force on critical space technologies.
30. RECOGNISES the need to strengthen the Union's autonomous, secure and cost-effective access to space, NOTES the Commission's measures to secure alternative launch solutions with third-country providers in duly justified circumstances and EMPHASISES the urgency of and need for continuity in supporting the adaptation, development and deployment of autonomous European launch capabilities to access space, taking into account the essential security interests of the Union.

31. RECALLS the need to ensure the enhanced continuity and further development of the current operational components, in particular Copernicus, Galileo and EGNOS, in the further programming of the EU Space Programme.
32. CALLS for the streamlining of procurement processes by all actors involved in the EU Space Programme, and for further integration of new space actors and the emerging space ecosystem into the Programme (including start-ups, new entrants and SMEs), and UNDERLINES the importance of open and transparent public procurement processes which support the development of a diversified and innovative European space industry, taking into account the objective of promoting the Union's strategic autonomy in an open economy in particular in terms of technology across key technologies and value chains.
33. INVITES the Commission to build upon the assessment⁶ of the existing obstacles that prevent better market uptake of space-based data and services across all sectors of the economy, as removing these barriers is critical for purposes of maximising the EU Space Programme's socio-economic benefits and ensuring that its potential is fully realised across the Union, and CALLS on the Commission, together with the entrusted entities, including EUSPA, and with the involvement of Member States, to address these challenges through a forward-looking strategic approach emphasising collaboration, innovation and adaptability, made possible by drafting and adopting a space data strategy that is fit for purpose.
34. INVITES the Commission to enhance a strong Union space economy by reinforcing competitiveness, innovation, entrepreneurship, skills and capacity building in all Member States and Union regions, with particular regard to SMEs and start-ups.
35. NOTES however that the key indicators, as provided for in the Regulation, should be better defined in particular with regard to competitiveness, the role of SMEs, and certain elements of programming, therefore ACKNOWLEDGES that the new Conceptual Framework would be an important tool for assessing the benefits of the EU Space Programme.

⁶ Doc. 12013/24.

36. RECOGNISES, that continuous user-driven investments in competitive innovation and infrastructure are essential to maintain leadership in space technologies and to foster synergies with programmes and initiatives supporting new space applications through technologies such as artificial intelligence, quantum technology, autonomous systems and cybersecurity.
37. WELCOMES the leveraging of the EU Space Programme to further position the Union as a reliable partner in space diplomacy. The Programme's achievements serve, mainly through the Copernicus, Galileo, EGNOS components and the SST subcomponent, as worldwide benchmarks and are vital for developing and strengthening partnerships with third countries, which are essential to enhance the EU's global influence and promoting international cooperation in space.
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