JCB – Strategy Workshop- QUESTIONNAIRE

Background

Satcom, whilst once a niche market, is becoming mainstream. It is now the target of large corporations and individuals beyond Europe, with access to large capital, who are highly motivated to be at the forefront of space exploration and technology development, capable of adopting faster innovation cycles and willing to embrace higher risk projects.

Whilst Europe has a good track record for developing key technologies, its speed of innovation has not kept pace with other regions, widening the competitiveness gap. Europe is driven by a more cautious approach to risk and hence limiting innovation, that is leading to reduced private investment, decreasing the relevance of European system integrators or service providers, and the lack of major ecosystem players . This is further exacerbated by European satcom players losing control of strategic assets such as spectrum through mergers & acquisitions (M&A) activity, and threatening competitiveness in global satcom market.

We should shape together the European vision on future space systems and initiatives to lead strategic domains of future worldwide connectivity by establishing a long-term roadmap, enhancing the required competences and mechanisms within Europe, adapting funding levels and embracing innovation to realise European potential.

We need to increase the speed of innovation in Europe, the risk appetite, and the development of industrial capabilities. It is therefore critical for us to reflect together on existing programmatic mechanisms and funding levels to adapt to the new dynamics of the satcom domain to keep European Industry competitive in the years to come.

Risks / Consequences of Status Quo for ESA MS Industry

• Decrease relevance and influence, reduced competitiveness, and loss of market share for European/Canadian satcom value chain

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• Risk of losing preparedness and relevance in supporting the future evolution of IRIS2.

• Risk of missed market opportunity for DTHH, 6G and automotive connectivity in Europe.

• Decreased influence of Europe in strategic areas, such as spectrum.

• European pace, reduced appetite for risk, and underfunding is compromising emerging strategic areas such as quantum networking.

QUESTIONS FOR MEMBER STATES

1 COUNTRY : SLOVENIA

2.While IRIS2 is a fantastic and unique opportunity to support the strategic positioning of Europe with sovereign capabilities in the security domain, it is possible that there will be commercial market domains not covered by IRIS2. Which future satcom market domains do we want Europe and Canada to lead in the 2030s, complementary to IRIS2?

3.It is key to identify areas of national interest for respective Member States to ensure a throughout assessment of priority areas. What specific areas are a priority or align best with your national interests in the medium and long term?

4.The pace of innovation approach to risk-taking needed to keep European/Canadian Industry competitive requires reflection of our current mechanisms. How should we adapt our approval processes, funding levels, as well as declaration and implementing rules to match new satcom dynamics?

5.IRIS2 is a visionary and strategic initiative for Europe. How can ESA satcom programmes exploit synergies with IRIS2 and best support its future evolution?

6.Dominant nations are advancing at great pace in areas where Europe has been a leader and competitive to date, such as the optical communications domain. How can we maintain leadership and remain competitive in such areas in the coming years through the ESA satcom programmes?

7.Disruptive new initiatives, such as Direct to Handheld (DTHH) represent substantial growth opportunities, however European/Canadian presence is currently limited. How should we react in ESA programmes to these fast-growing markets with potentially very high returns?

8.European and Canadian future relevance is threatened on emerging strategic areas, such as quantum communications that are expected to develop in longer term. How should we support positioning Europe and Canada with ESA programmes on those emerging strategic areas that are potentially transformational, but which have a longer term of maturity / return on investment?

9.Industrial capabilities of dominant countries are advancing at significant pace (e.g. through investment in mass production, industrialisation through automation/AI…). How should ESA support the enhancement of industrial capabilities to keep Europe and Canada competitive and relevant in the global market?

10.Large satellite constellations bring a significant challenge on spectrum allocation and management complicating substantially the interference management and increasing the concerns about space sustainability. How should the European/Canadian satcom community undertake proactive actions on interference and debris minimisation?

11.What other actions not listed above should ESA undertake to support the competitiveness of the European/Canadian satcom sector?

12.Additional comments on the workshop and the reflection on the strategic position of the European/Canadian satcom sector?