



RIIGIKOGU

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ESTONIAN PRESIDENCY OF EISC

2025

Annual EISC Workshop
Tartu, 27-29 April, 2025

Annual EISC Plenary Session
Tallinn, 03-05 September, 2025



PROCEEDINGS



ANNUAL EISC WORKSHOP

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The mindset and expectations for European policy have changed. Space has become critical to European security and resilience. Space for economic security has also emerged as a topic of concern. European companies are intrinsically tied to space technology and data; any disruptions to services would harm these companies, as well as national economies and societies at large.

To match U.S. levels of innovation in the space sector, Europe must overcome its aversion to failure. Embracing the concept of “failing forward”, where unsuccessful tests are viewed as valuable steps toward technological advancement, is essential. As participants noted, the word “experience” stems from “experiment.” Yet, in Europe, development processes are often hampered by institutional and governmental reluctance to accept the risks associated with failure. This cautious approach slows innovation and puts Europe at a strategic disadvantage. As technological innovation accelerates, it is crucial for Europe to keep pace. Falling behind could leave the region vulnerable to emerging security threats posed by rapidly advancing technologies.

Another critical issue is Europe’s cautious stance toward defence. While European discourse is shifting towards greater acceptance, several delegations emphasised that we must not shy away from the concept of defence, as doing so has limited our ability to fully harness the strategic value of space systems. In the face of ongoing wars in Europe, hybrid threats (such as cyberattacks and the sabotage of undersea cables), and growing internal security challenges, governments must adopt a more proactive and pragmatic approach. Space capabilities are essential in detecting, understanding, and responding to these threats. To effectively protect our interests, Europe must assert greater autonomy in both defence and space capabilities.



Dual-use emerged as a key topic of interest. While the concept of dual-use in relation to space technology is not new, delegations noted that Europe must make greater use of this term and employ it; fully leveraging all technologies in Europe to support missions of varying nature. It was mentioned that 0.24% of GDP in the U.S. is dedicated to space in the form of federal budgets, compared to 0.07% in Europe. In Europe, we can do the same if we manage to market the concept “dual-use”.



Investments and budgets related to space technology also featured prominently in discussions. Several key and innovative actors have emerged in the European space ecosystem such as ICEYE, Unseenlabs, and even Estonia’s Kappazeta and Cybernetica. These companies also face competition from established actors that maintain the larger bulk of contracts and activities. Europe needs to maintain a balance between its traditional companies and rising stars. Delegations mentioned that this could be achieved through taking greater risks with national procurement models, such as dedicating no more than 80% of total funding in traditional space companies and devoting the remaining 20% to SMEs and startups. This would allow stable growth while also taking risks by investing in new and emerging technologies.

Comments were raised that Europe needs to also move beyond traditional PPP models and reliance on conventional procurement methods as these structures are inhibiting innovation and new sparks. While valuable for established giants in industry, SMEs and startups need more dynamic environments and contract opportunities to get their technologies off the ground. Furthermore, industry actors noted that there are plenty of funding opportunities in Europe, but that governments need to be reliable customers themselves. Participants stated that governments tend not to be committed customers and are



more hesitant to dedicate budget to space or new technologies. In addition, while several companies are being established with similar technologies and products, this is not a hindrance to European innovation. Smart duplication and smart redundancy efforts are needed for strategic and security reasons, by ensuring the availability of capabilities in the case of conflict or threats to national security.

A unified political will and approach to addressing threats to space technologies and systems is needed in Europe. Greater awareness of regional security issues (such as the Arctic and the Mediterranean) needs to be shared among European nations. States in southern Europe might not be as concerned or aware of the threat that Russia poses on a daily basis, so further education is required to support a more coordinated and unified policy approach. Europe must avoid becoming isolationist and instead look to partners within the continent and abroad (e.g. Australia, Japan and South Korea) to forge new, strong relationships. European institutions, such as the EU, must ensure that nations across the continent are included in defence activities, such as Norway, Switzerland and the UK. Too much focus on the EU will inevitably leave some partners behind. ESA is also a key actor in bolstering European space technologies and activities. Leaving the agency out of

the discussion will result in disjointed efforts, which will inevitably inhibit European security as processes remain slow and unable to adapt quickly enough to shifting geopolitical trends. Delegations noted that no single country can protect their space infrastructures, including at the European level, alone.

Cyber resilience is crucial to securing national systems and critical infrastructure. Estonia is a prime example of a country vulnerable to foreign interference in the electronic and cyber domains. A key priority is the use of precise terminology, particularly in distinguishing between cyber and electronic attacks, which are fundamentally different. Clear terminology can support attribution and response activities. Moreover, discussions highlighted that cyber threats are not typically directed at satellites or spacecraft, but rather at ground infrastructure. Subtle methods of cyber hostility, such as data interception, silent duplication, or the disruption of data transmission, pose serious and invisible risks. Key initiatives to strengthen resilience include the development of cyber ranges, which allow participants to gain valuable training in how to identify, attribute, and respond to cyber threats. Additionally, adopting new technologies alongside space and cyber, such as quantum computing, can provide additional support for data encryption.



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1 Panel Sessions - Reflections

Parliaments are the voice of the people. Politicians must promote the value of space within their institutional frameworks and in the broader policymaking sphere and translate the importance of this domain to citizens and society. This was the dominant theme during the panel sessions on 4 September 2025.

THE EUROPEAN THREAT LANDSCAPE AND WHAT ROLE FOR EUROPE

There are no borders in space. Delegations emphasised the fact that conflict lies at the near periphery of the continent. The United States (US) is separated by seas and geography, and this reflects their mentality in relation to security. For Estonia and several European countries, Russia remains an existential threat to the existence of states and societal structures in Europe. Space infrastructure features a consistent target of Russian interference through jamming, spoofing, and cyberattacks.

While Russia is a current and persistent threat, it is important to remember that China represents a long-term strategic challenge. China maintains long-term strategic thinking, aiming for milestones beyond 2030, and expressing ambitions for 2050. The analogy that best exemplified this dichotomy was that of a bleeding hand: if your hand is bleeding out and at the same time your toe is hurting, you will attend to the hand that is bleeding. China is not to be underestimated; “they have goals, and they tend to beat them”. Taikonauts are now rushing to Moon. The race to see who goes back to the Moon is in full swing. There is a clear path in China to achieve these objectives. Europe has yet to properly commit to its own ambitions.

INSIGHTS FROM THE DEFENCE COMMUNITY

Politicians must work to destigmatise the term “defence” in national discussions. Countries are looking to militaries when it comes to defining and understanding space security issues. However, military experts remarked that space security goes beyond military vulnerabilities and capabilities and actually affects all sectors of society. As such, defining security concerns should be done across ministries, and military actors can support in clarifying capabilities and collaboratively looking for solutions.

It is equally important to ensure redundancy and adaptation measures in the event of interference with space systems and assets. Technological problems cannot always be solved with technology

alone; safeguards must be put in place should space assets become compromised. Contingency plans in the event of conflict involving space technologies are vital in order to support reinstating systems and safeguarding critical infrastructure.

Greater situational awareness was highlighted as a key concern. A clearer view of potential threats and the ability to attribute attacks would strengthen Europe’s security. In the case of hybrid threats and cyberattacks, attribution is especially difficult. Policymakers, working with space and defence actors, must therefore define red lines and establish appropriate responses.

PERSPECTIVES FROM THE ESTONIAN PRESIDENCY, ESA, AND ESPI

The European Space Agency (ESA) urged parliaments to invest in space not only for defence but also for economic growth. Space is strategic and must be treated as such. The EISC Presidency also reminded participants that space has its origins in military innovation, with missiles and rocket programmes born out of conflict. The Presidency further remarked that “Space and defence are often synonymous”. Although this might not seem new, this comment serves to further remind politicians that one cannot speak about defence without including space, and vice versa. While perhaps a stark observation, times of crisis can drive transformation of national capabilities and reorient priorities.

ESA expressed that they had never expected to see Member States openly requesting defence-related projects from ESA, marking a significant shift in priorities and mindsets. The Agency also highlighted its experience with Galileo as proof of the Agency’s capacity to deliver large-scale projects that strengthen European activity. Looking ahead, the European Resilience from Space (ERS) programme and the planned ISR constellation are expected to support Europe in monitoring not only internal developments but also external borders, including those with Russia. ESA stressed the need for speed, both in the context of classical defence and in the realms of defence from space and defence in space.

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It was noted that ESA had already met with NATO prior to the Ministerial Council 2025 to explore further cooperation on specific issues. The Agency suggested that if Member States were to allocate part of their defence budgets to ESA optional programmes, such contributions could also count toward the NATO spending threshold. ESA underlined that parliamentarians should encourage their defence ministries to consider this option, as it would require limited additional effort while significantly supporting the scaling up of major security-related projects in Europe. Moreover, ESPI stressed that with 80% of Europe's public space funding in the hands of national governments, the majority of which are entrusted to ESA, discussions concerning a "European Model" need to find solutions on how to better coordinate political decisions within and between countries.

DRIVING COMMERCIALISATION AND INNOVATION

In terms of the commercialisation of space, speakers were quick to highlight ICEYE as a good example of a company that has risen the ranks quickly in Europe with a high-quality and competitive product.

In Europe we need competition! We cannot rely on one company, like the SpaceX model in the US. Europe instead needs two or more companies in order to guarantee choice and redundancy. We need to keep companies in Europe and make sure that once they are established that they maintain their bases on the continent longer than simply one year, five years, or ten years.

The goal is to keep a permanent roster of new and innovative companies and to see their development to fruition, from initial conception to maturation. The

example of SpaceX that even companies that look like they are about to fail can still become powerhouse enterprises. The company in its infancy, following three failed launches, almost fell into bankruptcy and upon the success of the fourth launch, was able to secure contracts and funding by government actors.

Europe remains a strong player in innovation, but it currently holds only a 10% share of global public investment in space, compared to around 50% for the US. Europe is falling behind when it comes to translating its innovations into competitive, market-ready products and business models. Companies like SpaceX thrive in their respective locations due to the economic opportunities available to them. To stay competitive, Europe must deepen its engagement with defence and space sectors, integrating them into a broader narrative focused on securing economic stability and security on the continent.

2 European Space for Sustainability Award

Originally launched in 2012, this year the former ESA-EISC Space for Sustainability Award has evolved into the European Space for Sustainability following the involvement of ESPI in the award process and the new mentorship programme introduced as part of the prize for the winning submission. The Award was presented by Marion Mirailles of ESA.

This year's award was presented to Dennis Jöckel for his project entitled Sustainable Re-entry Materials, and the special mention of the jury was presented to Kyrolos Georgey for Space Rated Plasma Actuation. The prizes were presented by the Chair of Estonian Presidency and the Director of ESPI.



These proceedings were drafted by James Francis under the EISC Secretariat, which is hosted by the European Space Policy Institute (ESPI).





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