IAF SYMPOSIUM ON EMERGING SPACE ECOSYSTEMS (E11)
Connecting Emerging Space ecoSystems (1)

Author: Ms. Bianca Santi
European Space Policy Institute (ESPI), Austria

Mr. Andrea Alberti
European Space Policy Institute (ESPI), Austria
Mr. Marco Aliberti
European Space Policy Institute (ESPI), Austria

MUTUAL PROSPERITY THROUGH SPACE: EUROPE AND THE GLOBAL SOUTH IN A NEW ERA

Abstract

Recent geopolitical developments underscore the risk of Europe assuming a secondary role in the reconfiguration of the global order. This challenge is particularly pronounced in the space sector, which has become an increasingly pivotal domain in international geopolitics. Nevertheless, Europe retains the opportunity to enhance its strategic positioning by adopting a forward-looking and pragmatic approach. In this context, strengthened cooperation with Global South nations could serve as a key catalyst in bolstering Europe's geostrategic influence and soft power while fostering relationships founded on mutual prosperity and reciprocal benefit. This study primarily aims to analyse emerging ecosystems in the space sector, with a particular focus on the ASEAN region, Gulf States, and African countries. The selection of the countries will be carried out using specific KPIs, developed by the authors through the examination of three main dimensions:

- Legal Aspect: Assessment of the presence and maturity of national space regulatory frameworks, with attention to international compliance and regulations for both public and private actors
- Economic and Industrial Dimension: Analysis of the national space ecosystem, considering the presence of players in the New Space Economy, local technological capabilities, and available infrastructure
- Geopolitical Perspective: Examination of participation in international treaties and agreements, as well as the strategic relevance given by geographic location, particularly in relation to space operations.

By applying these indicators within a specially developed matrix, the study will identify the countries with the greatest potential to initiate or strengthen forms of space cooperation with the European continent. Subsequently, existing collaborations between the European Union and these countries will be analysed to identify ways to optimise the use of European funds allocated to international cooperation in the space sector, with particular reference to those managed by ESA. Overall, the analyses carried out will enable the development of targeted recommendations to foster the joint development of European space ecosystems and those of partner countries through strategic and focused investments. Ultimately, this research aims to explore how space diplomacy and international cooperation can serve as strategic tools to strengthen Europe's global position. The Global South, with its growing space sector, offers Europe new opportunities for innovation, emerging markets, and strategic resources, fostering a more inclusive and resilient space ecosystem. Strengthening these partnerships will help Europe address geopolitical challenges while enabling emerging economies to accelerate their technological and industrial growth, promoting a sustainable space ecosystem and driving mutual prosperity and global progress.