

ESA Council at ministerial level
Bremen, 26-27 November 2025

Follow-up and debriefing to the Belgian space actors

Belgian Science Policy and Royal Higher Institute for Defence

KBR, Brussels
9 December 2025



Agenda

09:30 – Arrival

10:00 – Introduction by Hendrik Verbeelen

10:15 – Belgian Defence – ESA contribution

10:20 – Debriefing of CM-ESA 2025

11:30 – Q&A

12:00 – Lunch

Belgian Process

- **Main milestones**

- Difficult budgetary situation at Federal level
- Important long-term budget cuts announced at the level of science policy (Feb)
- Definition of BE level of resources 2026-2030 (May)
- Information meeting for BE space actors (26 Sept)
- Important investment in ESA programmes by BE MoD (Oct)
- One-off increase of budget in 2026 and 2028 for a total amount of 400 M€ (24 Nov)
- Subscription to ESA CM (26 Nov)

- **Next step**

- Newly allocated budgets have been subscribed, some need to be confirmed by a BE Ministerial Council decision by 31/01/2026.

Level of resources for Belgium

Period 2025-2030 (e.c. 2025)

- Total 2025-2030 space BE:

$$1277 \text{ M€} + 168 \text{ M€} + 400 \text{ M€} = 1845 \text{ M€}$$

“Participation Defence”

One-Off contribution

→ ~369 M€/y

- ESA: ~335 M€/y (including defence contribution)
- Intergovernmental (Eumetsat, ECMWF, ESO): ~25 M€/y
- EU, Bilateral, National: ~10 M€/y

Budget allocation for Belgium (e.c. 2025)

- Previous commitments (“Inéluctables”)
 - **1050 M€**
- New commitments for ESA programmes
 - **934 M€ (836 M€ period 2026-2030)**
 - See details later on
- Budgetary placeholder for new commitments for other programmes (EU co-funding, Bilateral programmes, National activities)
 - **9.29 M€** Individual activities to be approved in the future by BE CM

Resolutions

- 1) Elevating the Future of Europe through Space
- 2) Level of Resources for the Agency's Mandatory Activities 2025-2030
- 3) CSG (2026-2030)
- 4) ESA programmes and activities

Belgian Defence – ESA contribution

- Defence Space Applications are key for Belgian Defence
- Important Investment programs (2026-2034) : 617 M€
- 1/3 Budget DIRS is dedicated to Space and Cyber domain on the condition it can be accounted as NATO Defence Expenditure
 - dual use IS NOT sufficient to be accounted for Defence Expenditure, military use is.
- Relevant military space capability = mix of dual capabilities, commercial, civil **AND** specific military capabilities (classification, encryption, segregation, prioritisation, ...).

Belgian Defence – ESA contribution

Flagships are prio 1

- Space Based Earth Observation: development by 2030 of a sovereign multi-sensor constellation of ISR satellites.
- Space Based Space Surveillance : development of a sovereign in-orbit SSA capacity.

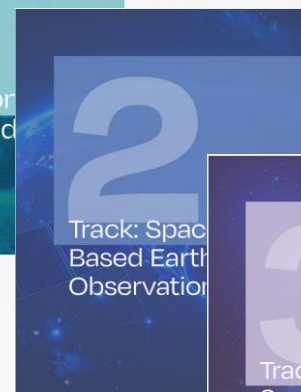
Approach to participate in ESA programmes

- Concrete defence-related projects
- Direct relevance to Defence, respecting military specificity (where applicable)
- Governance and monitoring of BEL Defence's contribution by BEL Defence in close collaboration with BELSPO





Belgian Defence – Space Roadmap



**Next Steps for other tracks
PNT, SatCom and Space Weather**



Debriefing CM-ESA 2025

Mandatory Activities and CSG 2026-2030

Programme	Envelope (M€)	BE (M€)	Compared to “Inéluctables” 2023-2027
Basic Activities (c.e.c.)	1859,00	52,2 (GNP ¹)	+ 243 M€ ESA + 6.9 M€ BE
Science Programme (c.e.c.)	3787,00	106.4 (GNP ¹)	+ 601 M€ ESA + 14.4 M€ BE
CSG (e.c. 2022)	680	22,30 (3,28 %)	+ 87 M€ ESA ² + 13,8 M€ BE ²
Total		180.9	+ 35.1 M€ @ new commitments BE

¹ BE GNP period 2024-2026 = 2.81 %

² “Inéluctables” for CSG defined only till 2027 (2028-2030 not covered)

Scientific Support (c.e.c)

Programme	Envelope (M€)	Covered (M€)	BE (M€)	Rem.
PRODEX	open	244.0	99.0	Till 2029 24 unconditional, 75 conditional

Programme responsible: Sophie.Pireaux@belspo.be

Update of PRODEX Guidelines as of 2026 on

- No more retroactive support for activities >1y old
- Need to update your proposal ASAP for change of scope or significant cost increase (quantitative info is needed, not just qualitative one)
- Keep travel expense to a minimum to allow task completion: avoiding sending more than one person to same conference/meeting on PRODEX funding in a same project team
- No systematic renewal of computers/servers at end of warranty: prefer warranty extension and adopt a value depreciation scheme
- LS&PS projects: only the part strictly related to space is to be financed on PRODEX budget
- Recommendation to secure key lab senior expertise needed on several project on a permanent contract

Exploration (e.c. 2025)

Programme	Envelope (M€)	Covered (M€)	BE (M€)	Rem.
E3P Period 3	3773	2975.7 ¹	109.9	Unconditional contribution
- LEO		704	47.9	
- Moon		620	27.0	
- Mars		445	3.0	
- Exploration Science		101	29.0	
- ExPeRT		133	3.0	

¹ Includes contributions not assigned to sub-elements

Programme responsible: Tom.Verbeke@belspo.be

Earth Observation (e.c. 2025) (1/2)

Programme	Envelope (M€)	Covered (M€)	BE (M€)	Remark
Future EO-1 Segment 3	1904.0	1799.9	53.0	21 cond.
Copernicus Space Component-4 Ph 3	850.0	839.0	30.0	
Digital twin earth	38.0	42.7	2.0	
InCubed 3	60.0	174,99	3.0	
Altius completions	NA		10	

Earth Observation - ERS (e.c. 2025) (2/2)

Programme	Envelope (M€)	Covered (M€)	BE (M€)	Rem.
ERS ELEMENT 1	100 + 250	166.6	16.0	9 cond.
ERS E2 - FNOC	25.0	29.8	2.0	
ERS E2 - ALPSTAR	25.0	24.1	2.0	
ERS E2 - ESCA +	300.0	325.0		
ERS E2 – Space Resilient Nodes	50.0	112.1	5.0	

Space Safety (e.c. 2025)

Programme	Envelope (M€)	Covered (M€)	BE (M€)	Rem.
S2P Period 2	933.0	955.3¹	44.4	
- CS: Planetary Defence	214.0	196.0	15.0	
- CS: Space Weather	285.1	275.3	10.9	
- CS: ADRIOS	189.0	168.8	3.5	
- COSMIC	244.9	276.2	15.0	3.7 cond. Excl MoD.

¹ Includes contributions not assigned to sub-elements

Programme responsible: Guillaume.Dervaux@belspo.be

Space Transportation (e.c. 2025) (1/2)

Ariane & Vega	Envelope (M€)	Covered (M€)	BE (M€)
Ariane-6 Product Adaptations	360.0	172.6	
Vega-C Product Adaptations	179.0	147.6	6.0
P120C Product Adaptations	81.0	40.0	
VEGA E	NA	56.6	10.0
VEGA High Thrust Engine	178	54.3	20.0
LEAP ARIANE 6	542.0	537.6	17.0
LEAP VEGA C	139.0	274,84	5.0
SEATS ARIANE 6	1024	1020.6	35.84
SEATS VEGA C	99.0	92.0	5.05

Programme responsible: Matthias.Piens@belspo.be Bram.Vandroogenbroeck@belspo.be

Space Transportation (e.c. 2025) (2/2)

Future Programmes	Envelope (M€)	Covered (M€)	BE (M€)	Rem.
FLPP	416.0	251.3	15.0	10 cond.
European Launcher Challenge	418.0	902.0	0	
Space Rider 3.1	32.4	32.4	1.0	
Total (incl. Contributions to ongoing programmes)	3462	4001.1	114.9	

Programme responsible: Matthias.Piens@belspo.be Bram.Vandroogenbroeck@belspo.be

Technology (c.e.c)

GSTP	Envelope (M€)	Covered (M€)	BE (M€)	Rem.
Develop	500.0	276.4	13.0	13 TBA
Make	136.0	193.5	23.0	Excl MoD 20.5 TBA
Fly	74.0	90.1	12.9	12.9 TBA
EEE	130.0	67.3	25,0	25 TBA
Resilience and Security Component	160.0	129.8	30.0	Excl MoD 8.5 TBA
Total	1000	757.09 + 128	103,9	79.9 TBA

Programme responsible: Matthias.Piens@belspo.be

Connectivity & Secure Comms (e.c. 2025) (1/2)

ARTES 4.0	Envelope (M€)	Covered (M€)	BE (M€)	Rem.
Future Preparation	40,0	20.3	1.1	
Industrial Competitiveness	150.0	455.2	40.0	18 TBA
PP – period 1 (QKD)	110	89.75	6,00	6 TBA
PP – period 2	40	38.82		
SPL-5G/6G	380.0	261	11,00	8 TBA
SPL-4S	195.0	112	7,00	7 TBA
SPL-ScyLight	315.0	434	6,00	6 TBA Excl. MoD
Total	1300.0	1085,16	71.1	45 TBA

Connectivity & Secure Comms (e.c. 2025) (2/2)

Programmes	Envelope (M€)	Covered (M€)	BE (M€)	Rem.
Moonlight	280.0	175.9		
Assign				Cancelled
Secure Connectivity Element 1	50	13.0	7.0	
Secure Connectivity Element 3	550	355.2	18.0	8 cond.

Programme responsible: Bram.Vandroogenbroeck@belspo.be

ARTES & GSTP Procedure

- No further cohorts are planned, revert to ad hoc evaluation of proposals for both industry- and ESA-initiated activities
- Budgetary vigilance in place until TBA & conditional budgets are confirmed
- Requirements for ad hoc evaluation to be communicated on Belspo website in January 2026
- Evaluation criteria established during cohort of 2025 will continue to be used rigorously

Navigation (e.c. 2025)

Programme	Envelope (M€)	Covered (M€)	BE (M€)	Rem.
NAVISP	110.00	204.6	7.0	Excl. MoD
- Element 1	25,00	46.0	1.0	
- Element 2	60,00	137.6	6.0	
- Element 3	25,00	21,0	0.0	
LEO PNT	400.00	484.8	43.3	13.3 cond.
GENESIS	40.00	39.1	11.0	+ PRODEX
PNT Demonstrator	190.0	236.1	6.0	Novamoon 4 cond.

Programme responsible: Corneel.Bogaert@belspo.Be Matthias.Piens@belspo.Be

Commercialisation (e.c. 2025)

ACCESS	Envelope (M€)	Covered (M€)	BE (M€)
Scale-Up	136	168.7	10.0
BASS	144	136.8	1.0
Total	280	305.5	11.00

Programme responsible: Corneel.Bogaert@belspo.be Hendrik.Verbeelen@belspo.be

ESA others (c.e.c)

Programme	Envelope (M€)	Covered (M€)	BE (M€)
National Trainee Programme	-	-	1.3
Education	-	-	1.0

Programme responsible: Carys.Dunn@belspo.be



Introduction MoD Contribution

Programme	BE (M€)	Rem.
GSTP MAKE	50.0	Flagship Tech dev for SSA et EO (post 2035, GALO Next gen). Industrial co-fund. <i>(For MATTEO project and short-term GALO dev., still CM22 budget applicable).</i>
GSTP EEE	3.0	Critical components (complementary to EDA works) Ex: Chips, Advanced packaging, PCB integration, thermal management technologies, etc.
NAVISP Element 2	20.0	PNT applications, with focus on space segment. Industrial co-fund.
Scylight optical and Quantum communications	15.0	Optical secure communication (hardware space segment, potentially ground segment)





Introduction MoD Contribution

Programme	BE (M€)	Rem.
S2P COSMIC	11.0	-Space Weather next gen: dev new tools and infra to enforce sovereign capacity to support MIL activities, but also dual use. -Potentially SSA complementary features.
GSTP RSC	69.0	
Total	168.0	



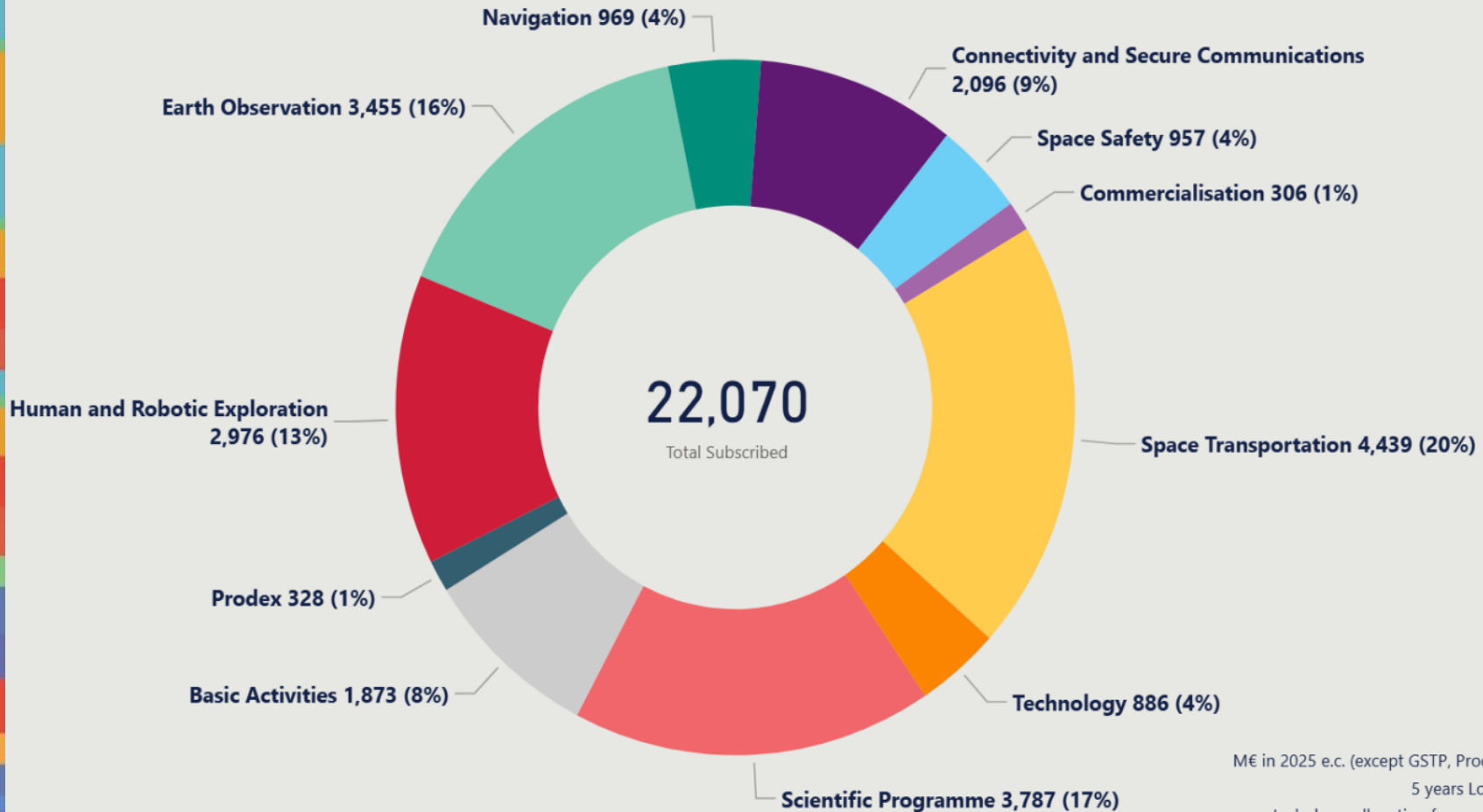
GLOBAL ESA¹

CM-ESA	2016	2019	2022	2025
ESA Mandatory	4.25 B€	4.74 B€	4.81 B€	5.65 B€
ESA Optional (+ CSG)	6.03 B€	9.65 B€	12.11 B€	16.42 B€
ESA Total	10.28 B€	14.39 B€	16.92 B€	22.07 B€
BE Total @ ESA	580.84 M€ (5.65 %)	817.61 M€ (5.68 %)	946.86 M€ (5.60 %)	1109 M€ ² (5.06%)

¹ Such as in ESA official communication: include full Level of Resources for Mandatory Activities and CSG over 5 years, Additional and Future Contributions, To Be Allocated and transfers.

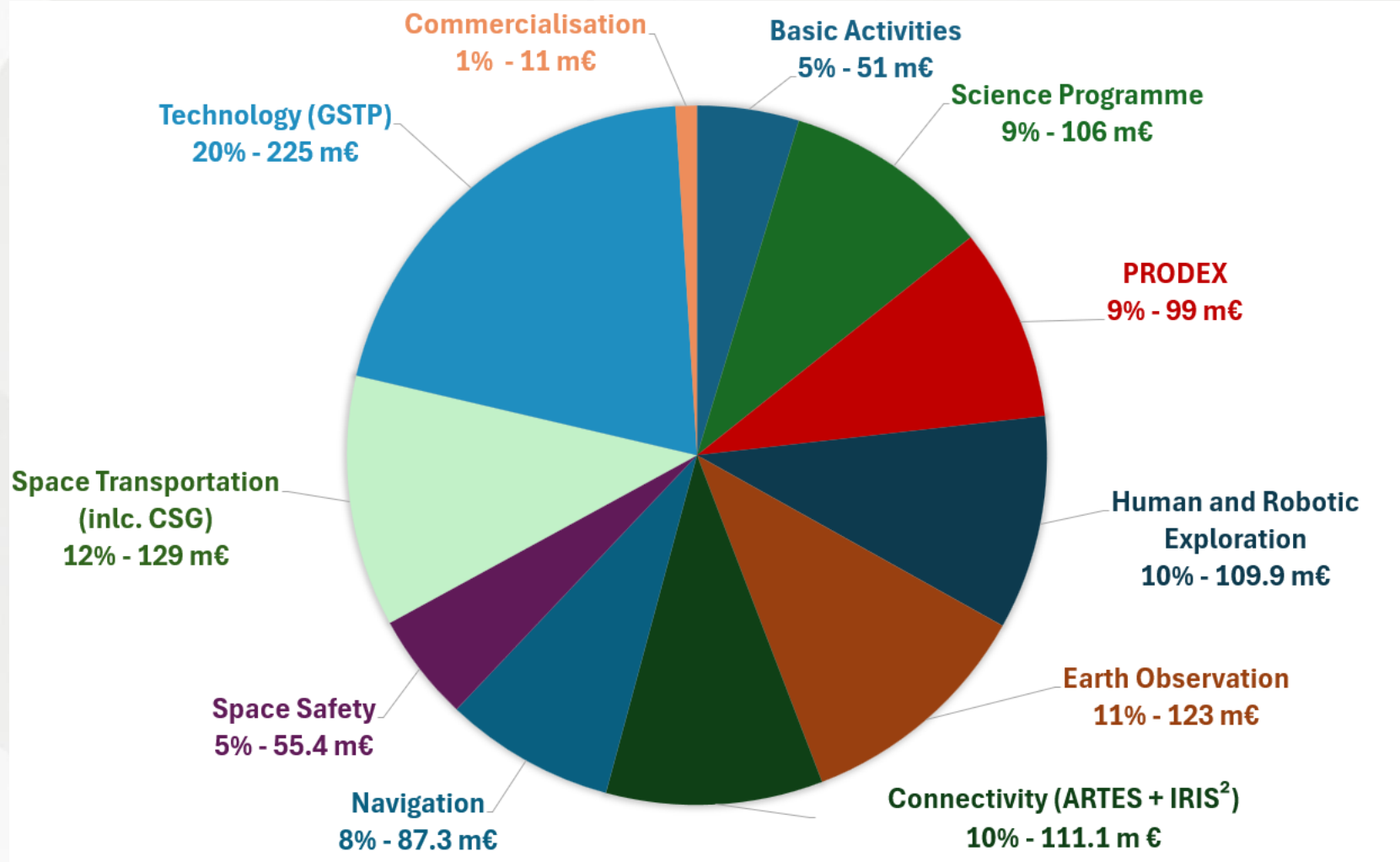
² Including Be MoD subscription to ESA optional Programmes

ESA subscriptions = 22.07 B€

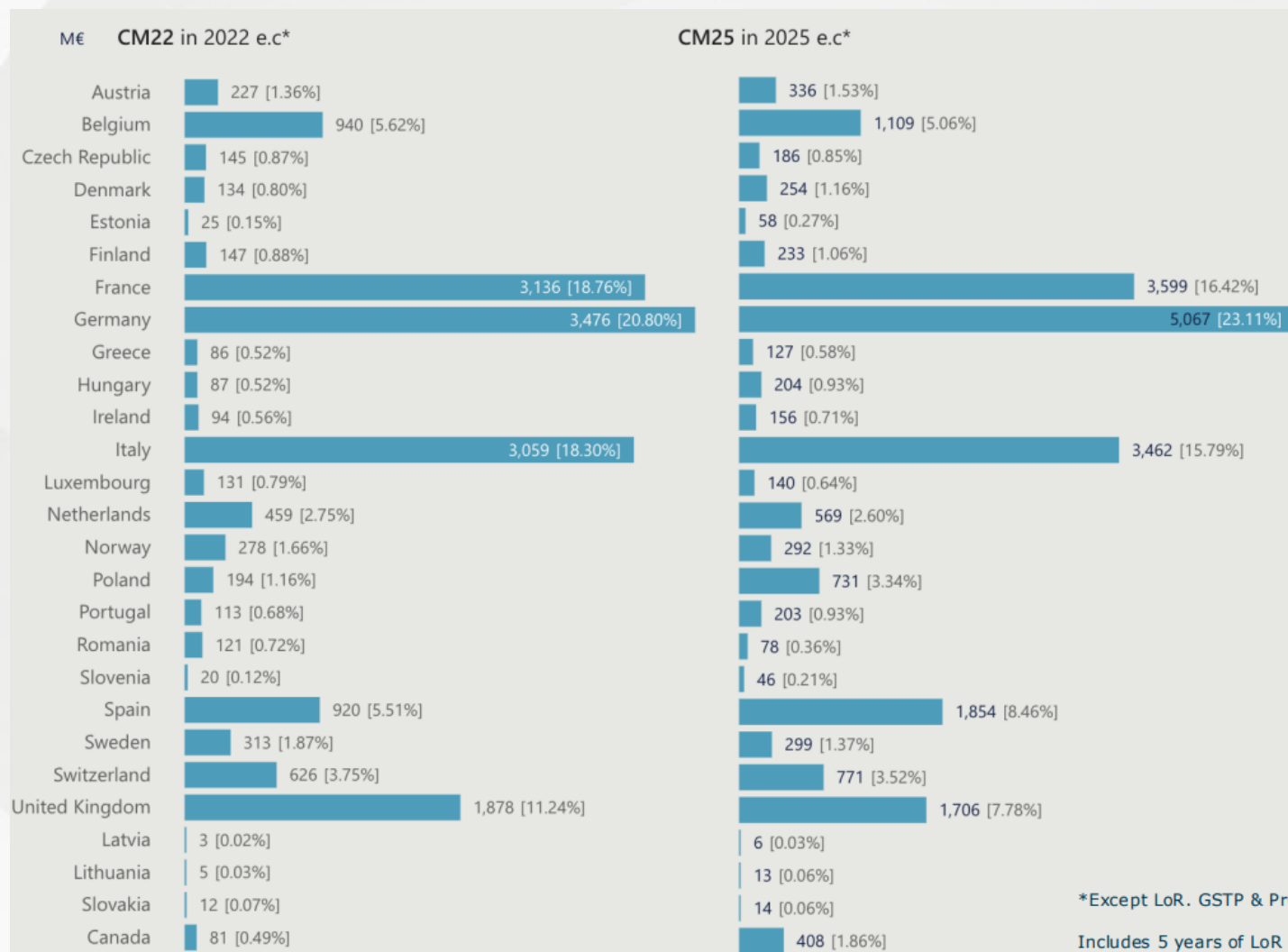


M€ in 2025 e.c. (except GSTP, Prodex & LoR in c.e.c.)
5 years LoR and 3 years CSG
Includes reallocation from on-going of 147 M€

BE subscriptions = 1109 M€ (incl. MoD)



2022 vs 2025 per Member State



*Except LoR. GSTP & Prodex in c.e.c

Includes 5 years of LoR & 3 years of CSG
Amounts net of reallocation from on-going programmes

Thank you