

SPACE PLATFORM NEWSLETTER

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HIGHLIGHTS

There has been a **notable increase in satellite launches mainly to reach LEO**, even when excluding Starlink

**LEO constellations are increasingly used to support C4ISR capabilities**

Around **90% of Earth Observation (EO) satellites launched** are commercially owned

**EO could align with, and generate value for, the portfolios of the entire executive leadership team** (from strategy to finance, technology, operations and sustainability)

The perceived **reputational risks may need to be changed in order for the financial sector to be able to properly finance the defence sector**

**Over half of global GDP is dependent on nature**

**85% of the world's population adheres to a religious or spiritual tradition**



- In January 2025, the White House **issued** an executive order declaring that the **OECD's Global Tax Deal, which includes a 15% global minimum corporate tax rate, has "no force or effect in the United States"** without Congressional approval. The House directed the Treasury to identify **protective measures against foreign tax practices** that could disproportionately affect American companies. The **European Union and the more than 100 other countries** that have agreed to implement the OECD's global tax deal **are considering their response**.
- The new ITU **SpaceExplorer application** (previously SNS Online service) allows users to **consult the space networks systems database of the ITU Radiocommunication Bureau** related to GEO and non-GEO satellite systems, Earth stations and Radio astronomy stations.
- The **Space and Global Health Network presented a draft** syllabus during the sixty-second session of the Scientific and Technical Subcommittee (STSC) of the UN Committee to develop an **interdisciplinary curriculum in Space and Global Health that examines the intersection of space sciences, technology, and global health**.
- A **paper** argues that **several executive roles, including financial, technology operations and sustainability executives, can gain substantial advantage by leveraging EO solutions**. While EO data still tend to centre around traditional public sector-focused applications, there may be a more compelling business case for wider adoption of EO by the private sector. This, however, requires strategic alignment with organizational objectives.



## • EUROPE AND EUROPEAN UNION

- The President of the European Commission **proposed** the **"ReArm Europe"** plan, which could potentially mobilize approximately **€800 billion to enhance Europe's defense industry and military capabilities**. This initiative includes (i) €150 billion in loans for defense investments

and (ii) allowing Member States to increase significantly their defence expenditures without triggering the excessive deficit procedure.

- The President of the European Commission **decided** to establish a **Commissioners' Project Group on Defence Union** to help deliver a coordinated approach on topical issues. The intention is to **work closely on building a true European Defence Union**.
- The **EU launched** the InvestAI initiative to **mobilise €200 billion of investment in artificial intelligence**, including a new European fund of €20 billion for AI gigafactories.
- During the 17th European Space Conference, the European Commissioner for Defence and Space Andrius Kubilius recommended **adopting a "big bang" approach for European space-related capabilities** in light of upcoming budgetary decisions such as ESA's November 2025 Ministerial and the next EU MFF 2028-2034. ESA's Director General Josef Aschbacher **highlighted that ESA is ready to closely work with the European Commission** in this respect and asked for **stronger European leadership and funding** (since Europe's 11% share of global public space funding is decreasing). EU's High Representative for Foreign Affairs and Security Policy Kaja Kallas identified **several priorities constituting the development of a "new European Space Shield"** such as (i) enhancing space situational awareness (SSA), (ii) establishing response mechanisms to space attacks and (iii) strengthening cooperation at multiple levels
- Negotiations between the EU and Norway have started to **allow the latter to participate to the GOVSATCOM programme** for critical governmental and security-related missions. Similar negotiations will likely begin with **Iceland**.
- The European Commission (EC) is **consulting** on a **new Strategic foresight report**, which is a systematic and collaborative way of analysing different possible futures and using these insights to inform policy.
- The EC is **consulting** on a **new EU startup and scaleup strategy**, which **could address the**

**many hurdles they face** in terms of access to finance, regulatory and bureaucratic burdens and fragmentation, access to markets, access to talent, and access to infrastructure, knowledge and services.

- The EC has launched a series of **consultations to prepare for the next multiannual financial framework (MFF)**, the EU's long-term budget (2028-2034).
- The EU Council is drafting conclusions on the **use of Earth Observation data from constellations for civil protection and crisis management**.
- The EU is drafting papers for the Open-ended Working Group (OEWG) on the Prevention of an Arms Race in Outer Space (PAROS) addressing the **challenges of militarization and potential conflicts in outer space** and normative frameworks concerning threats arising from state behaviours with respect to outer space.
- Representatives of the financial sector **argue** that **some aspects of the EU sustainability framework should be clarified** in order to increase funding for European defence.
- The EC has **adopted** proposals to **cut red tape** and **simplify EU rules for citizens and businesses**, including in the area of sustainability reporting obligations and to **unlock opportunities in European investment programmes**.
- In the **Competitiveness Compass**, that provides a strategic and clear framework for the Commission, **dependance on the resilience of space infrastructure** is mentioned as a **threat that requires a closer alignment between the public and private sectors**.



#### European Space Agency (ESA)

- **ESA 2025 budget** is around **€7.68 billion**, with 62% coming from member states amounted to over two thirds, (62.6%) and the rest from European Commission, EUMETSAT, and other partners. Earth Observation receives the largest allocation, with €2.5 billion (33.6%) followed by

navigation (12.5%). Around 10% is allocated for connectivity and secure communications.

- Via a **permanent open call**, companies can **submit their ideas on how they will mature** the more than 550 **patents** and patent applications that ESA has in its portfolio.
- ESA and Estonia will develop an **ESA Space Systems For Safety And Security Programme** called **Space Cyber Range**.
- The **Agency is actively monitoring asteroid 2024 YR4** (estimated to be between 40 and 100 meters wide), **which has a non-negligible (around 1%) probability of impacting Earth on 22 December 2032**.
- ESA and the European Commission consolidated their **cooperation on the European Quantum Communication Infrastructure** (EuroQCI).

#### European Innovation Council (EIC)

The EIC has **selected 71 companies for funding** (collectively €161 million in grants and €226 million in equity), including a number of space-related companies.

#### European Defence Fund (EDF)

The **EUDIS Business Accelerator and Matchmaking (BAMM) programme**, under the EU Defence Innovation Scheme (EUDIS), a flagship initiative of the EDF to support new defence companies, was **launched**. Applications could be made in March 2025.



#### NATO

For the first time, NATO released to the public an **integrated air and missile defence policy**, which makes several references to space-related policies.



#### Germany

The country adopted a **National Security and Defence Industry Strategy** which **includes space technologies as a key industry for the national interest** and a commitment to develop such

technologies and related infrastructure, in particular for dual-use applications at national and EU levels.



France

**Lionel Suchet was appointed interim CEO of CNES** following the appointment of Philippe Baptiste as Minister for Higher Education and Research.



Italy

The country's space agency has launched a project to **power future lunar settlements** through the creation of an **energy hub powered by miniaturized nuclear fission reactors**.



USA

### In general

- Since the commencement of President Donald Trump's second term in January 2025, the **federal workforce has experienced significant reductions**. Around **100,000 civilian federal employees have been laid off or offered buyouts** as part of the administration's efforts to streamline government operations. Whilst it has been reported that NASA did not proceed with the layoff of probationary employees, this could **include several space-related agencies** such as approximately NASA's, the Office of Space Commerce of the National Oceanic and Atmospheric Administration and possibly the U.S. Space Force.
- It is estimated that around **1 million federal employees responded to the Office of Personnel Management's (OPM) email requesting a summary of their weekly accomplishments**. This represents approximately one-third of the federal workforce.
- **Several strategies have been proposed to fight back against misinformation such as to** (i) embrace humor and satire to challenge misinformation (a well-crafted joke spreads faster than a fact-check), (ii) deploy insider leaks and strategic whistleblowing, (iii) cultivate non-

affiliated online voices that challenge misinformation in ways official corporate accounts cannot.

### White House

- An executive order **to build the Iron Dome for America**, a next-generation missile defense shield for the United States against ballistic, hypersonic, advanced cruise missiles, and other next-generation aerial attacks, was **signed**. The order also directs a review of theater missile defense posture to defend United States troops deployed abroad and an increase in cooperation on missile defense technology development, capabilities, and operations with partners and allies.
- It has been **decided** to **suspend offensive cyber operations against Russia**.
- India and the US **pledged** to **elevate military cooperation across all domains**, including space, and cyberspace, through enhanced training, exercises, and operations, incorporating the latest technologies.
- **Defense Secretary Pete Hegseth is directing Pentagon agencies and the military to cut their budgets by 8%**, including focusing on priorities such as modernizing the nuclear force and cutting several programs long deemed critical.

### Congress

**The House is hearing debates on ways to improve the Artemis program.**

### Federal Aviation Administration (FAA)

The FAA **invites** public comments about proposals for conducting **commercial space launches**.



Russia

**Yuri Borisov, the head of Russia's space agency, Roscosmos, was dismissed. Dmitry Bakanov, formerly a deputy transport minister and satellite company executive, has been appointed as the new leader of Roscosmos.**



## South Korea

logistics project, **proposing the construction of two landing pads on Johnston Island, a remote atoll in the Pacific Ocean.**

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A **new space strategy was approved**, including plans for reusable launch vehicles, orbital transfer vehicles, ultra-high-resolution satellites and very-low Earth orbit (VLEO) satellites with multi-layered orbital navigation systems, and a space observatory to be sent to the Sun-Earth L4 Lagrange point—a region of space yet to be visited—and lunar landers.



## China

- The country's National Space Administration has for the first time **allowed a private company to participate in lunar exploration missions.**
- China is **strengthening its space alliances, particularly in Africa and with countries like Pakistan** to develop space infrastructure, including ground stations.
- From 200 warheads in 2020, China is **expected to have more than a 1000 nuclear weapons by 2030.**

## Space Finance News

The **Defence Equity Facility** has been set up. **This facility could invest € 175 million** between 2024 and 2027 via the European Investment Fund (EIF) into private funds (venture capital or private equity funds) with investment strategies targeting European companies developing innovative defence technologies with dual-use potential.

## Spaceports News

- A company was granted a (conditional) **vertical launch licence to launch from the SaxaVord Spaceport** in Scotland in 2025.
- Germany has **committed** an additional €870,000 to support the development of an **offshore launch platform that will operate from the North Sea.**
- The US Air Force is set to launch an environmental impact review for a novel military