

SPACE PLATFORM NEWSLETTER

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**HIGHLIGHTS**

We are entering into a **new era of the normalization of deviance**, i.e., an environment in which people grow accustomed to and tolerant of what had previously been considered unacceptable behavior

**AI technologies are inherently of a dual-use nature and could be misused**

**Amplifying action to live in harmony with nature** could be **useful** for material survival, economic prosperity and personal and collective fulfilment

**Several nuclear propulsion projects are in development**, which could increase traditional spacecraft velocities by a 7-fold factor (>500 000 km/h)

There are ongoing initiatives to more **closely integrate satellite-based solutions into financial reporting obligations**.

## UNITED NATIONS / GLOBAL



- The UN **estimates** that the world is facing a **\$4 trillion annual financing gap** for development and mounting trade wars.
- The Secure World Foundation issued its annual **report** on **global counterspace capabilities**, showing a growing industry.



## EUROPE AND EUROPEAN UNION

- The European Commission and Ukrainian Government have agreed to **allow Ukraine to participate in key components of the EU Space Programme**.
- **Airbus, Thales and Leonardo are planning to merge their space-related assets in a joint company** and have informally notified the European Commission of their intention.
- Following the White Paper for European Defence – Readiness 2030, see our last **Blog**, the Commission proposes a new **Regulation that amends well-established public financing principles**. In essence, the proposal allows to:
  - accumulate funding under the European Defence Fund (EDF) with funding under other related funds (as an exception to the principle that the same activities cannot be funded twice by the EU budget)
  - transfer resources allocated to Member States under shared management to programs managed by the European Commission
  - amend the following programs (that have an exclusive civil focus) to support dual-use projects: Digital Europe Program and Horizon Europe Horizon Europe (under the European Innovation Council Accelerator)
  - amend regulation on supporting ammunition production (ASAP) and the Connecting Europe Facility (CEF) to further channel EU funds towards defence industry and technologies.
- It has been **estimated** that the **cost of replacing US military support in Europe would be in the range of € 1 trillion**, assuming a 25-year lifecycle. Not only European allies would need to replace major US manpower (estimated at

128,000 troops), but also **address shortfalls, including in space** and all-domain intelligence, surveillance and reconnaissance assets, including the ability to detect early indicators of an attack and to understand plans once an attack was launched.

- It is **reported** that the European Commission intends to **group several funds under the umbrella of the so-called new Competitiveness Fund**, including the EU Space Program and the European Defense Fund and to dismember the future research and innovation program (FP10 to succeed to Horizon Europe) across different headings under such Competitiveness Fund.

### Horizon Europe

The 2025 program has been **adopted**, including the cluster **Digital, Industry and Space** (with a budget decrease from the €1.62 billion, compared to a 2024 draft), with reference to space-related research to support the following:

- autonomous access to space and to spaceports
- space transportation
- space on earth
- monitoring space
- develop safer, more trustworthy and human-centric Artificial Intelligence (AI)
- preparation of an in-space operations and services pilot mission
- clean and digital transition
- Copernicus program
- Cassini's initiatives, with new focus on jobs

The first calls for proposals are currently open.



### European Space Agency (ESA)

- The Agency is preparing a **record budget proposal of €21 billion**, focusing on defence capabilities, to be presented at the November 2025 ministerial summit in Bremen, including plans for a reconnaissance satellite constellation (ultra-high-resolution optical and infrared imaging) and to increase European resilience.
- The Agency issued a new **space environment report**. It considers that adherence to space debris mitigation standards is (slowly) improving over the years.

- The Agency has signed a **cooperation agreement with the Indian Space Research Organisation to collaborate on human spaceflight**, focusing on Earth orbit, but with provisions for potential future missions to the Moon.
- The Agency is **assessing the implications of proposed U.S. budget cuts to NASA programs**.



- The country will restructure the former Ministry of Education and Research into the **new Ministry of Research, Technology and Space (BMFTR)**.
- Germany's Bundeswehr has announced **plans to develop its own ~€10 billion satellite constellation** by 2029, focusing on secure military communications and reconnaissance.



### White House

- The Trump administration unveiled its **proposed fiscal year 2026 “skinny” budget**, which includes a nearly **25% reduction in NASA’s funding, from \$24.8 billion to \$18.8 billion**. This significant cut marks the **largest single-year decrease in the agency’s history and would profoundly reshape NASA’s human spaceflight programs**, particularly the Artemis lunar initiative, including the Orion Crew Vehicle, developed with European Space Agency (ESA) contributions, the Space Launch System (SLS) and the Lunar Gateway, a collaborative effort involving NASA, ESA, JAXA, and CSA. The budget proposal indicates a strategic pivot toward utilizing **commercial spaceflight systems for future lunar missions**. The budget allocates \$7 billion for lunar missions and \$1 billion for Mars-focused programs, signaling an increased emphasis on Mars exploration. This could mark a pivotal moment in U.S. space policy, but the initial proposal must undergo the legislative process in Congress.

- By contrast, the **proposal**, in combination with \$119 billion in mandatory funding, **increases defense spending by 13%** and prioritizes investments to strengthen the safety, security and sovereignty.

### Congress

- The **Armed Services Committees have proposed to increase by \$150 billion the \$886 billion defence budget**, including \$25 billion dedicated to the “Golden Dome” missile defence initiative. Approximately \$15 billion of the proposed \$25 billion would be used as funding for satellites, space-based sensors and interceptors, and launch infrastructure.
- A bill was **introduced to direct NASA to establish a university-affiliated research center** to fund analyses and engineering support related to cislunar and deep space missions and interplanetary research.

### NASA

- Whilst approximately 10% of its workforce has already been affected, including the termination of about 1,000 probationary employees and around 750 staff accepting deferred resignation offers, the restructuring efforts are ongoing and **NASA has initiated a phased approach to workforce optimization**, which includes **closing certain offices** such as the Office of the Chief Scientist and the Office of Technology, Policy, and Strategy. Additionally, the agency is offering **early retirement and buyout incentives to employees to encourage voluntary departures**.

### US Space Force

- The Force has **released a structured approach to analyze and organize space superiority**, including a series of defensive and offensive actions such as orbital and terrestrial strikes and space link interdiction
- The Force has **released a new doctrine**, which outlines core principles, mission, and battle management, including that the *“space force will do whatever it takes to achieve space superiority”* (Saltzman).

## Other

- The **Center for Strategic and International Studies (CSIS)** issued a new **assessment** of the security of space systems in view of threats posed by foreign government capabilities. It argues that **certain counterspace activities** such as cyberattacks, jamming and spoofing activities and unfriendly behaviors in space **have now become commonplace** and rarely trigger an escalatory or retaliatory response. Also, it considers that China, Russia, Iran, and North Korea, which face heightened tensions, each has sought some type of **coalition of convenience** on space cooperation to fulfill their national ambitions.
- **Offices involved in space issues**, such as the Office of Science and Technology Policy and the National Security Council, **have seen personnel changes and reduced influence**.

## Africa

The **African Space Agency**, based in Cairo, Egypt, is **operational**.

## BRICS countries

The heads of the space agencies of the BRICS have agreed to create a **Space Council**, as proposed by Russia, to serve as an advisory body to coordinate joint activities.



## South Korea

The newly established Korea AeroSpace Administration (KASA) **indicated ambitions to land spacecraft on the Moon by 2032 and Mars by 2045**, signaling its intent to become a major player in space exploration.



## China

- The country is launching the **Chang'e-8 mission, planned for 2028, to test technologies essential for constructing a lunar base**, in international cooperation. This

mission is part of the broader International Lunar Research Station (ILRS) project, a collaboration between China and Russia, which envisions establishing a lunar base near the Moon's south pole by 2036.

- **There is a significant possibility that China will land astronauts on the Moon before the end of this decade**, including following successful tests of the Long March 10 rocket, Mengzhou spacecraft and Lanyue lander.
- China has released **regulations for direct-to-device satellite services**, laying the foundation for domestic growth of the emerging sector.



## Russia

The country plans to launch **240 additional LEO satellites for its navigation system by 2030**.

## SPACE FINANCE NEWS

- The European Investment Bank (EIB) and the Luxembourg Space Agency (LSA) have **agreed to cooperate to enhance the integration of European space applications in the financial sector**, ultimately benefitting industries such as investment banking and insurance. The intention is to more **closer integrate satellite-based solutions into financial reporting obligations**. There will be a pilot program to explore the full potential of using satellite imagery and other space data for project monitoring and impact assessment using concrete pilot projects.
- **As part of the announced \$600-billion commitment to invest in the United States, the parties agreed to set up a \$5 billion "new era aerospace and defense technology fund"**.

## SPACE FINANCE NEWS

- China and Malaysia are studying an **equatorial spaceport project located in Malaysia**.
- The Horizon Europe 2025 program contains reference to R&D for spaceport-related projects.