SPACEPP
Uniting the space ecosystem

SPACE PLATFORM NEWSLETTER

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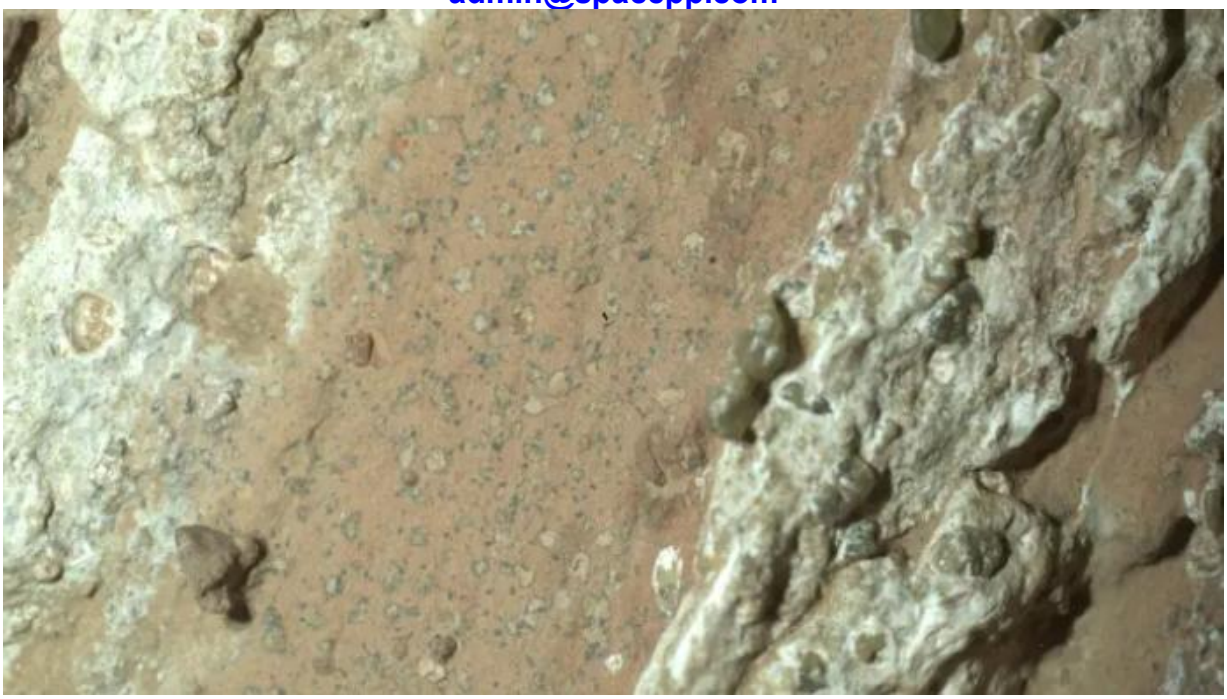
www.spacepp.com
admin@spacepp.com



HIGHLIGHTS

A rock collected on Mars shows features consistent with a possible biosignature, but alternative, nonbiological chemical processes must still be ruled out

For the first time, a decision was taken to scrap an independent space agency

For the first time, two countries coordinated the maneuver of a satellite

We are “sleepwalking” into a more complex, unpredictable and more dangerous nuclear arms race

It is planned to build a nuclear reactor on the Moon

Despite technological demonstrations, satellites are still treated as disposable, without any possibility of refueling or repairing them. Progress will require interoperability standards

A handful of countries have operational consumer direct-to-cell texting space-based services, but with small market share versus “normal” GSM/3G/4G/5G services

UNITED NATIONS / GLOBAL

The United Nations Office for Outer Space Affairs (UNOOSA) in collaboration with Jaxa have opened a **new round of applications for KIboCUBE program to develop Cubesats**.

EUROPE AND EUROPEAN UNION

- The European Commission (EC) is consulting **on the draft Space Act until 24 November 2025**. Anyone can provide feedback and comments. For more information about the draft Space Act, please refer to our Blog.
- The EC has proposed a series of **defense projects, including the concept of a Defence Space Shield**, which aims to keep the bloc competitive in Space Domain Awareness to monitor threats and which will be open to all member countries and could be at least partially financed by the €1.5 billion European Defence Industrial Programme, which is still being negotiated.

Continuation of Horizon Europe

- It is very likely that **dual-use projects will be supported by the whole of the next Horizon Europe programme.**
- **National government expenditures for R&D** increased by 59.5% from 2014 to 2024. Whilst a large part was directed to the general advancement of knowledge (35.7% for general university funds), 6.1% of the budget allocations went to the exploration and exploitation of space, a bit less than for health (7%). However, the **EU still has a long way to go to reach its target of spending 3% of its GDP on R&D**.

European Space Agency (ESA)

The **coming months will be critical for ESA, as its member states are set to decide on its next three-year budget** at the ministerial council in Bremen on November 26-27. It is reported that the Agency is preparing a budget proposal in the range of € 20-23 billion, a 30-36% increase on the current three-year budget of €16.9 billion.

UK

- In an unprecedented move, the government has decided (for budgetary reasons) to **end the status of its space agency (UKSA) as an independent executive agency** and absorb it into a government department.
- The government issued a report on the **benefits of the UK's investments in the European Space Agency.** The report considers that every £1 public investment in ESA programmes leads to £7.49 directly benefiting the UK economy.

Germany

- The German MoD announced that **Germany would invest €35 billion in space-related defence projects by 2030,** in line with the following priorities:
  - hardening against data disruptions and attacks
  - improved space situational awareness
  - redundancy through several networked satellite constellations
  - secure, diverse, and on-demand launch capabilities
  - a dedicated military satellite operations centre.
- **Space, aerospace and satellite systems have been included** in the German

Hightech Agenda Deutschland **as one of the strategic research areas**. This is a strong signal that the German government intends to support such technologies.

NATO

- The first staff-to-staff **dialogue on defence industrial cooperation and capabilities between NATO and the Republic of Korea occurred**, including space-related items.
- NATO has identified the **need for more space-related capabilities,** including in areas such as SSA, the ability to recover or replace degraded/destroyed space assets quickly (e.g. via disaggregated constellations, satellite servicing, on-orbit repair, proliferated smallsats), secure SATCOM, PNT, Intelligence, Surveillance, Reconnaissance (ISR) and Earth observation, early warning & missile / launch detection and counter-space & defensive space operations.

EU USA

The **implications of** the July 25, 2025 EU–U.S. **trade agreement** (and related implementation steps) for the transatlantic space sector **are as follows**:

- secures reciprocal **tariff-free treatment for** "all aircraft and aircraft parts, but **not for satellites and their components**, which likely remain subject to the **15% ceiling** for export of many EU goods, including those in sectors like semiconductors, unless exempted
- **15% EU export tariffs on semiconductors**, but semiconductors **exported from U.S. to EU should face MFN or zero** (if in the exempt list)
- **50% tariffs on EU export of critical metals** like steel, aluminum, and copper, materials essential for rockets and satellites, but tariff-rate quotas for U.S. steel imports and MFN rates for U.S. aluminum (0–7.5%).
- Mutual commitments to coordinate on **export controls** and "technology security requirements," especially for critical technologies such as chips
- **customs simplifications for high-tech sectors,** including aerospace
- EU commits to **€40 billion in U.S. AI chip purchases**
- **No U.S. obligation to buy any EU** energy, chips, or defense goods or other items
- Arguably the deal **reduces the EU's ambitions** for technological sovereignty and risks leaving its space and defense ecosystem reliant on U.S. supply chains at a moment when strategic autonomy is critical.

USA

White House and federal government

- The White House has moved to **eliminate employee unions at NASA**, among other agencies, on national security grounds.
- The potential **costs of the Golden Dome's project** (see previous newsletter) have been estimated "at anywhere from **$252 billion to $3.6 trillion over 20 years**, depending on design".
- It is reported that the Commerce Department has moved to rescind roughly **40 %** of the current-year funding for the **Office of Space Commerce (OSC).**

Congress

- During a senate hearing, **the issue of whether China might land humans on the Moon before the U.S was discussed**, including the challenges NASA faces such as to being able to refuel in Earth orbit and manage cryogenic propellants, the need to develop the vehicle to descend to the

Moon's surface and return and the strategic, diplomatic, and security implications of which nation leads in lunar exploration.

- A bill to **streamline the application of regulations relating to commercial space launch and reentry requirements and licensing** of private remote sensing space systems was introduced.
- A bill to **modify the authority for space transportation infrastructure modernization grants** was introduced.
- A bill to require the Secretary of Defense to initiate **discussions with Australia, India, and Japan to identify mutual areas of interest** with respect to the formulation of best practices in space, cooperation on space situational awareness, and space industrial policy was introduced.

NASA

- **Nearly 4,000 NASA employees opted for voluntary buyouts.**
- It is reported that there are plans to expedite **building a nuclear reactor on the lunar surface** to support space science and exploration.

Federal Communications Commission (FCC)

The FCC decided to **expedite space and earth station approvals**, including by eliminating the requirement to file certain license modification applications and eliminating outdated rules.

US Space Force

- **$39.9 billion for fiscal year 2026** has been proposed as the Force's budget.
- **The U.S. Space Command headquarters will relocate** from Colorado Springs to Huntsville, Alabama.
- The **first-ever coordinated satellite maneuver by U.S. Space Command and U.K. Space Command occurred**. This demonstrates coordination in space operations, signaling interoperability and a shared posture in defense of space systems
- The Force conducted its **largest-ever space exercise, "Resolute Space 2025**".

Namibia

The **country adopted a space science and technology bill** to set out a framework to guide Namibia's space activities.

China

- The Chinese Ministry of Industry and Information Technology (MIIT) **promoted direct-to-device (D2D) services** by encouraging partnerships between telecommunications giants and satellite firms, and commercial trials for Internet of Things (IoT) services.
- **Satellites, as part of the Space-based Internet Technology Demonstrator series, were launched**, with the world's first new deployment of a set of full-flexible solar panels that can be rolled up.
- China has introduced **new rules to strengthen quality control and supervision across the commercial space sector**, marking a significant step towards standardizing private activities.

Russia

- The Russian space agency **Roscosmos has hailed the first face-to-face meeting between its leader and the head of NASA**
- Several **changes in the management of Roscosmos** are reported.

SPACE FINANCE NEWS

European Investment Bank (EIB) has signed a **€385 million financing agreement with a Spanish technology company to boost research, development and innovation of cutting-edge technologies for the defence and space sector**. This is the largest EIB's financing agreement in Spain to date to strengthen the European Union security and defence capabilities.

SPACEPORTS NEWS

- Portugal has granted the **Atlantic Spaceport Consortium a licence** to build and operate a **rocket launch facility on the island of Santa Maria.**
- As per the ESA and European Commission agreements relating to the Flight Ticket Initiative, whilst missions to fly on the Vega-C rocket will depart from the French Guiana, other **missions will depart from the Andøya Spaceport in Norway.**
- **The U.S. President issued an executive order on commercial space regulation that** contains several provisions to **lift regulatory barriers to next generation spaceport infrastructure**, including an evaluation of the need to lift state approvals relating to coastal zone requirements and endangered species, the need to cut red tape and to expedite environmental and administrative reviews for authorizations, permits, approval, real property leases and any other activity relevant to spaceport infrastructure development.
- The **€35 billion by 2025 investments announced by the German MoD may partially benefit the projects aimed at developing sea launch means in the North Sea** (via a floating spaceport or a marine platform (e.g. a vessel repurposed or modified) to act as a launch site.
- The **construction of a new multi-user** (up to 5) **commercial launch facility on the grounds of the Guiana Space Centre in French Guiana has started**. It will be located on the old Diamant launch site at the Centre and could be used by providers operating rockets capable of carrying payloads of up to 1,500 kilograms.