

OCTOBER 2025, ISSUE #132

EUROSPACE POLICY NEWSLETTER

Our monthly spotlight on the European space scene

THIS MONTH IN OUR NEWSLETTER

A European Space
Shield

ESA DG meeting with
the Eurospace
Council

Status of preparation
of ESA CM25

A debriefing of the
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Consultation
Workshop

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environment...

EDITORIAL

BY CHARLES GALLAND



Under the Danish Presidency of the Council, Europe is raising its shields once again. Not to conquer new worlds, but to protect its own space.

There is something fitting about this moment. The land of the Vikings, once recognised and feared for its warriors and their round shields, now presides over a European Union determined to defend its place in orbit. Announced as part of the Communication on the Defence Readiness Roadmap 2030, the European Space Shield is one of four pan-European Defence Flagships “that no Member State alone can build, and that will protect all of Europe”, as Commissioner for Defence and Space Andrius Kubilius put it during the Space for European Resilience Conference on October 28th.

Designed to complement existing EU dual-use capabilities (Positioning, Navigation and Timing with the Galileo Public Regulated Service, geospatial intelligence through the Earth Observation Governmental Service, and secure communications with IRIS²), the European Space Shield aims to incentivise Member States to jointly develop sovereign capabilities. Something that the EU is “in stark contrast outstandingly successfully” doing for European space projects, and “with less success stories for defence projects” - Commissioner Kubilius in his own words. The Space Shield is scheduled for launch next Summer. With it, the continent aims to turn a symbol of its past into an instrument for its future: a shield forged not from wood and iron, but from satellites, launchers, sensors, and data.

Protection, however, is not only about technology or regulation (aspects that, in the industry’s view, the EU Space Act in its current form only partially addresses), it is also about means.

With a proposed Ministerial package of slightly below €22 billion, the European Space Agency seeks to safeguard Europe’s autonomy in access to space, strengthen its excellence in Earth observation, navigation, or science, and preserve the industrial capabilities across the 22 optional programmes that will be submitted to ESA Member States for subscription. If Denmark has already earmarked around 160M€ (1.2 BDKK) to boost its voluntary contribution to the European Space Agency over 2026–2028, uncertainties and questions remain over some of the major contributors to ESA; some with deep pockets, others with little to spare, some tempted to follow a national path, and others motivated to act collectively as Europeans. If, as acknowledged by ESA Director General Josef Aschbacher in front of the Eurospace Council on October 30th, it is unlikely that all projects will be funded at their desired levels, tough choices will have to be made. ESA Member States will need to balance national priorities with the collective European ambition, ensuring that the most strategic programmes receive the resources required to maintain Europe’s technological autonomy and competitive edge.

In other words, ambition must be matched by collective means: the shield Europe seeks to raise in space cannot be built on intentions alone.



FILL IN YOUR DIARIES

Space Tech Expo Europe 2025

- **Date:** 18-20 November 2025
- **Location:** Bremen (Germany)
- **Registration:** [here](#)



Eurospace Webinar "Newspace by the numbers"

- **Date:** 20 November 2025
- **Location:** Online
- **Registration:** [here](#) (Eurospace members only)



ESA Council Meeting at Ministerial Level (CM25)

- **Date:** 26-27 November 2025
- **Location:** Bremen



HIGHLIGHTS

On October 30th, ESA DG Josef Aschbacher was invited by the Eurospace Council to engage in an open dialogue with industry representatives in view of CM25.

ESA DG notably informed industry that the total package for CM25 was around 22B€ (see p.9-10) and that the formal package will be sent to Ministers, pending an extraordinary Council on November 7th. He also called for industry to support the package and explain to decision-makers how a significant contribution to this package can strongly impact national industry in a positive way.

ESA DG emphasised the importance of ensuring the profitability of the European space industry, underlining that the work being done is remarkable and that Europe benefits from a highly capable industrial base. He stressed that industrial policy should be developed in a way that supports companies in remaining profitable, recognising that sustained investment is necessary to maintain the sector's performance and to enable it to continue contributing to Europe's technological and strategic ambitions.



POLITICAL ENVIRONMENT

Space/Defence



Defence Readiness Roadmap 2030



- On October 16th, the European Commission and the High Representative of the Union for Foreign Affairs and Security Policy published a Joint Communication entitled “Preserving Peace - Defence Readiness Roadmap 2030”, to be seen as a comprehensive plan to strengthen European defence capabilities;
- The Roadmap sets clear objectives and milestones for defence readiness by 2030. It will build on up to 800B€ of investments, including through new funding instruments such as SAFE;
- The roadmap states that there is an urgent need to invest massively and in a coordinated manner in pan-European projects that will shield Europe as a whole against pressing threats. Four initial European Readiness Flagships are proposed, among which a European Space Shield (to be launched in Q2 2026);
- EU Member States reacted in Council Conclusions ([here](#)) strengthening the role of the European Defence Agency. They also called for “accelerated joint development of space assets and services that serve security and defence purposes, as well as for the protection of existing assets, including dual-use assets, given their importance for Europe’s strategic autonomy”.



European Commission Work Programme 2026



- On October 16th, the European Commission published its Work Programme for 2026;
- The 30-page paper outlines the coming legislation, pending proposals (including the EU Space Act), and planned repeals;
- The Defence European Space Shield - action plan (non-legislative, Q2 2026) is mentioned;
- Two proposals regarding defence are planned: Simplifying defence and sensitive security procurement (legislative, Article 114 TFEU, Q2 2026) and Qualitative Military Edge programme (Q1 2026).



Political agreement on EDIP

- On October 16th, The European Parliament and the Council of the EU reached a political agreement on the European Defence Industry Programme (EDIP);
- With a budget of 1.5B€ for 2025–2027, EDIP introduces targeted measures to address the main challenges faced by Europe’s defence industry, including industrialisation of defence products, industrial ramp-up, support to European supply chains and SMEs, and the development of Ukraine’s defence technological and industrial base;
- The co-legislators agreed on a “EU-made content” rule requiring at least 65% of components in funded projects to originate from the EU or associated countries;
- Furthermore, EDIP introduces new mechanisms such the European Defence Projects of Common Interest;
- As soon as EDIP enters into force, the Commission will work on the programming with a view to finance the most pressing priorities in line with the Defence Readiness Roadmap 2030.



POLITICAL ENVIRONMENT

Space/ Defence

Keynote Speech by Commissioner Kubilius at the 5th European Defence & Security Conference

- On October 14th, European Commissioner for Defence & Space Andrius Kubilius delivered a keynote speech at the 5th European Defence & Security Conference;
- Space was mentioned several times:
 - To recall that the proposed budget in the next MFF could be up to 131B€ for defence and space (rumours about a 50-50 split between both domains are circulating);
 - To address the “Defence Readiness Roadmap 2030” and the Space defence shield;
 - To raise it as an example of successful pan-European cooperation, with projects such as Copernicus and Galileo.
- The Commissioner also delivered a speech ([here](#)) at the occasion of the “Space for European Resilience Conference” on October 28th (see Eurospace report below).

Space Budget



Resolution on Elevating the Future of Europe through Space

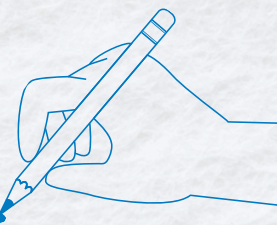
- At ESA CM25, beyond subscribing to ESA optional programmes, ESA Member States shall adopt a Resolution entitled “Elevating the Future of Europe through Space”;
- The draft Resolution lists five overarching objectives for ESA:
 - Protect Our Planet and Climate;
 - Explore and Discover;
 - Strengthen European Autonomy and Resilience;
 - Boost European Growth and Competitiveness;
 - Inspire Europe.
- The draft resolution notably “encourages to continue its focus on industrial competitiveness and profitability”, “stresses the need for public space actors in Europe to closely cooperate and coordinate their actions with a view to optimising the value of investments in space”, and “the need to use European launchers for all European and national institutional missions”;
- Regarding CM25, it has been reported that the Dutch government has decided to contribute 344.3 M€ (maintenance of its current spending levels) to ESA over the next three years.



Statement by the Commission on current discussions on the MFF proposal

- In a public statement released on October 16th, the European Commission said that it “does not speculate on individual elements of the proposal or individual positions by the co-legislators” and that it “remains focused on achieving an outcome that ensures a modern, balanced, and future-oriented EU budget serving the interests of all Europeans”;
- This statement echoes reports from the European Parliament that the EPP Group and the S&D are opposed to the proposal for “National and Regional Partnership Plans (NRPPs)”.

Briefings



“Defence Readiness Roadmap 2030”

On October 16th, the European Commission and the High Representative of the Union for Foreign Affairs and Security Policy published a Joint Communication entitled “Preserving Peace - Defence Readiness Roadmap 2030” to be seen as a comprehensive plan to strengthen European defence capabilities.

“Understanding the ESA European Resilience from Space Programme Proposal”

ESA has been mandated by its Council to prepare a new optional programme on security and resilience for CM25: the European Resilience from Space (ERS) programme. ERS is seen as the foundation and enabler for the future EO Governmental Service (EOGS) under the leadership of the European Union, for enhanced situational awareness in security and defence.

“Presentation of the resilience pillar of the EUSA”

The EU Space Act is divided in 3 main pillars: safety, resilience and sustainability. The resilience pillar is composed of articles 75 to 95 of the proposal for a regulation issued by the European Commission, and is focusing on cybersecurity, physical protection, supply-chain integrity and continuity of services of space assets.

Reports

“Space for European Resilience Conference”

On October 28th in Brussels, the European Space Agency (ESA), the Danish Presidency of the Council of the EU and ESPI organised the “Space for European Resilience: rising to the collective challenge” high-level conference.

“EU-ESA General Assembly on Defence, Space and Cybersecurity”

On September 20th, ESA, the European Parliament and the European Commission’s Representations in Italy organised a conference on “defence, space and cybersecurity”; Commissioner A. Kubilius and ESA DG J. Aschbacher were notably amongst the speakers.

“NEREUS Info Session on the proposed EU Space Package”

On October 10th, the “Network of European Regions Using Space Technologies” (NEREUS), organised a Webinar around the “EU Space Package” (EU Space Act, Vision for a European Space Economy, European Competitiveness Fund).



EUROSPACE AT WORK

Eurospace Policy Committee

- The last Eurospace Policy Committee meeting took place on October 29th. Topics such as the EU Space Act, defence at EU level, support to export were addressed;
- A dialogue with Mr. Laurent Jaffart, Director of Connectivity and Secure Communications at ESA was organised;
- The next meeting of the PC is planned for December 2nd.

EU Space Act TF

- Following the set-up of a Eurospace TF to provide Industry consensual recommendations on the EU Space Act in September, two online meetings and one meeting with DG DEFIS were organised;
- As a result of the internal process, a Position Paper has been approved at TF level;
- The paper has been transmitted to the Policy Committee for final approval by November 6th 2025.

EU Access to space TF

- A new Task Force covering the EU approach to access to space has been set up. The "EU Access to space" TF will aim at providing Industry consensual recommendations on access to space as the EU will make it a key component of its future space programme in the next MFF.

Relationships between established and emerging space ecosystems

- On May 16th 2025 in ESRIN, Eurospace co-organised with the Slovak Space Office the third edition of the European Space Ecosystem Integration Summit. The event aimed at establishing exchanges around needs and capabilities that exist within emerging European space countries;
- Eurospace executive and the Slovak Space Office have worked towards issuing a first draft of a White Paper which aims at defining the challenges and recommendations for helping to integrate emerging space ecosystems into the European value chains. The draft is currently reviewed by the members of the Policy Committee.

Compliance

- The first draft of the ECSS I-branch high-level documents has been transmitted to the ECSS Technical Authority and is now under review until the end of the year. The I-branch WG convenors have also proposed a roadmap with a timeline and a list of potential standards to be adopted or used for educational material;
- On the new issue of ECSS Standards, all existing requirements have been processed and recategorised in the new documents' division. A final report and next steps will be released in December. Some training material should be available in June 2026 to train the ECSS users. Eurospace shall draft a common report with Eurospace key messages on the final draft of ECSS NextGen.

NEWS FROM (OUTER) SPACE



The SPACE AISBL (composed of EUROSPACE, SME4SPACE, ESRE, EASTRO and EASN) is the signatory of a Memorandum of Understanding (MoU) with the European Commission, officially establishing the Globally Competitive Space Systems Co-Programmed European Partnership (see Eurospace Policy Newsletter n°120).

A SUCCESSFUL CONSULTATION WORKSHOP

After its third successful Consultation Workshop held on October 22nd, the Space Partnership has marked another milestone. The event gathered the Space Partnership's community for a full day of discussions focused on refining the detailed content of the Partnership's Strategic Research and Innovation Agenda (SRIA).

The workshop centred on two essential themes:

- **Earth Observation & Satellite Communication (EO & SatCom)** – addressing Europe's competitiveness and innovation needs for future missions and services;
- **New Space Transportation Systems (NSTS)** – exploring how to strengthen Europe's position in an evolving global launch landscape.

The **65 participants** contributed valuable feedback that will directly support the update of the SRIA. The discussions confirmed that the Partnership's priorities are well aligned with sector needs, providing a strong basis for collaboration moving forward.

A DIRECT IMPACT ON HORIZON EUROPE CALLS

And as the Partnership marks its first year of operations, community engagement remains strong. This is reflected in the [HORIZON-CL4-2025-02 \(SPACE-HADEA\)](#) call, which closed on September 25th with 39 proposals submitted. The NSTS topics drew solid participation, with 7 proposals for access to European spaceports, 9 for digital enablers and building blocks, and 3 targeting demonstration activities. Earth Observation and SatCom topics also saw high interest, confirming their strategic importance for Europe's space sector. The next steps will focus on evaluation and selection in early 2026, with calls 2026 expected to open in Spring, guided by the roadmap-based approach and continued stakeholder feedback.

At the same time, work continues on key ongoing activities, including the collection of additional activities that demonstrate complementary efforts across the Partnership's scope, and the phasing-out scenario, which will help plan the transition toward the end of the current Multiannual Financial Framework (MFF) period. The work on the recommendations for the next MFF continues as well.

For further updates and announcements, follow the Space Partnership on [LinkedIn](#) and visit the [Partnership Hub](#) within the EU Space Ecosystem. If you have any questions, please contact jean-charles.treuet@eurospace.org or lea.kessler@eurospace.org



SPECIAL FOCUS: Status of Preparation for ESA CM25

The European Space Agency (ESA) Council meeting at Ministerial level (CM25) will be held in Bremen, Germany on 26 and 27 November 2025 to determine Europe’s funding priorities for the coming years. Novelty for this CM, ESA DG requested the Inspector General for the implementation of an internal independent assessment process in advance of the finalisation of the various Programme Proposals, with the objective to prepare a solid package for CM25.

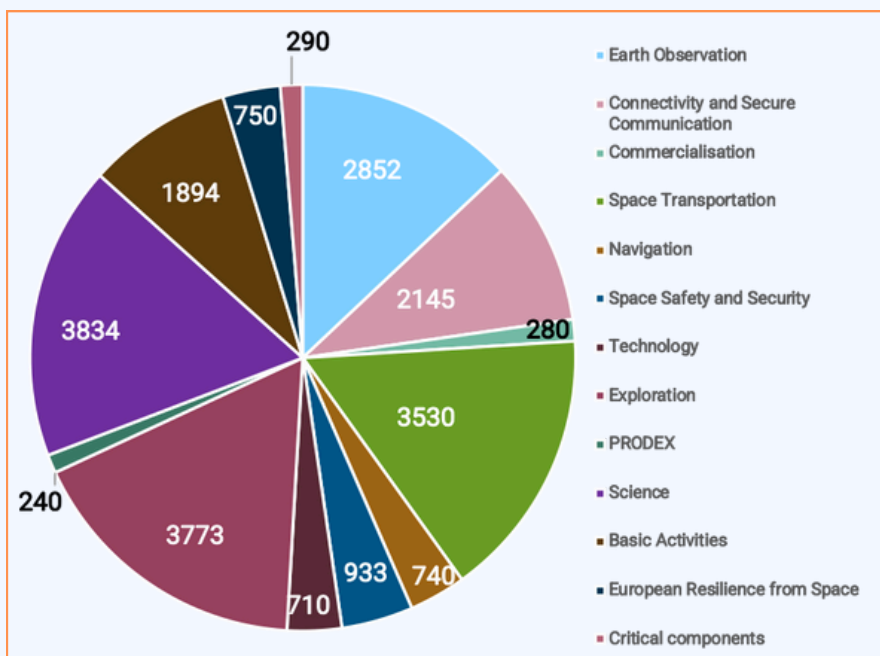
This process started in September 2024 and was implemented by the Independent Project Management Authority (IPMA) which performed an assessment of the preliminary available documentation and draft proposals to verify the solidity of the programme from various key aspects such as governance, risks, schedule and cost.

In a nutshell

22 Optional Programmes will be proposed ESA MS for subscription. As of Mid-October, 7 Optional Programmes have issued their Declarations:

- Scientific Experiment Development Programme (PRODEX)
- Copernicus Space Component Programme
- Future Earth Observation Programme (FutureEO)
- European Earth Watch Programme (Digital Twin Earth DTE Element)
- European Earth Watch Programme (InCubed Element)
- Navigation Innovation and Support Programme (NAVISP)
- Accelerating Commercialisation and Competitiveness of the European Space Sector Programme (ACCESS) Programme

TRUTHS (which was designed to calibrate climate models by precisely measuring both incoming and reflected solar radiation) has been discarded notably as the United Kingdom, which had been the leading backer of TRUTHS, reportedly withdrew its support for the mission after a recent spending review.



As of end-October, the financial envelope of ESA Programmes to be subscribed at CM25 is of 21,971B€

It is unlikely that all projects will be funded at their desired levels. Experience from past CMs shows that about 93% to 95% of the proposed package is typically funded

To go deeper

Key: Green (mature for CM) Orange (pending issues) Red (discarded)

Earth Observation

- Copernicus Space Component Programme - 850M€
- Future Earth Observation Programme (FutureEO) - 1.904B€
- European Earth Watch Programme (Digital Twin Earth DTE Element) - 38M€
- European Earth Watch Programme (InCubed Element) - 60M€
- European Resilience from Space for Earth Observation ERS-EO - 750M€
- TRUTHS

Connectivity & Secure Communication

- ARTES 4.0 - 1.230B€
- Moonlight - 315M€
- Secure Connectivity/IRIS² - 600M€ (370M€ + 230M€)

Commercialisation

- ACCESS (Accelerating Commercialisation and Competitiveness of the European Space Sector Programme) - 280M€ (136M€ for Scale-Up and 144M€ for BASS)

Space Transportation

- Programme for Competitiveness improvements of Ariane 6 and Vega C (CIP) - 798M€ (+136M€ in complementary contributions)
- Launchers Exploitation Accompaniment Programme (LEAP) - 655M€
- Reusable In-orbit Demonstrator for Europe (Space Rider) - 26M€
- Future Launchers Preparatory Programme (FLPP) - 416M€
- Centre Spatial Guyanais (CSG) - 680M€
- Strengthening Exploitation for Access To Space (SEATS) - 730M€

Navigation

- NAVISP - 110M€
- FutureNAV - 630M€

Space Safety and Security

- S2P Period 3 - 933M€

Technology

- GSTP - 710M€

Exploration

- European Exploration Envelope Programme (E3P) Period 4 - 3.773B€

Science

- Science Programme (Mandatory) - 3.834B€
- Scientific Experiment Development Programme (PRODEX) (Optional) - 240M€



PROMOTING OUR MESSAGES TO THE GENERAL PUBLIC

NextSpace Symposium (09/10/2025)

On October 9th, Eurospace Research and Managing Director Pierre Lionnet was invited by Way4Space to share his insights on the the Very Low Earth Orbit (VLEO) market outlook.



NEREUS Info Session on the proposed EU Space Package (10/10/2025)

On October 10th, Eurospace Secretary General Olivier Lemaitre delivered his views on the EU Space Act at the occasion of a Webinar organised by the Network of European Regions Using Space Technologies (NEREUS).



Visit of Japanese delegation to Eurospace (21/10/2025)

On October 21st, a delegation from the Cabinet Office, Government of Japan payed a visit to Eurospace offices to understand the work of the Association and discuss preliminary views about the EU Space Act.



IFRI Workshop (23/10/2025)

On October 23rd, the French Institute for International Relations organised a workshop around the future of space cooperation. On this occasion, Eurospace Policy Manager Charles Galland delivered industry insights.



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