

DECEMBER 2025, ISSUE #134

EUROSPACE POLICY NEWSLETTER

Our monthly spotlight on the European space scene

THIS MONTH IN OUR NEWSLETTER

2025: a year in
review

Advanced information
on the EU Space
Shield

Our second public-
access Webinar
“Newspace by the
numbers”

A specific session at
the 18th European
Space Conference

Your usual columns:
editorial, political
environment...



EDITORIAL

BY CHARLES GALLAND



True to its raison d'être, Eurospace closely monitors European space policy and technology developments, providing our institutional counterparts with timely expertise and recommendations. 2025 proved no exception.

In February 2025, three years after Russia's invasion of Ukraine, and in response to Commissioner Andrius Kubilius' call to assert Europe's independence in security and defence, the critical role of the European space industry in shaping the future of space and defence integration in Europe was laid out. Too often taken for granted or even ignored, space technologies and services are critical to enhancing Europe's defence autonomy, the success of military operations and, ultimately, securing Europe.

Alignment of visions? Space, security and defence have been brought together under a single policy window within the European Competitiveness Fund, issued by the European Commission in July 2025. The proposed 131B€ budget covering the three sectors appears, at first glance, to respond to the space industry's June 2025 call for an envelope of 40 to 60B€ for the EU Space Programme under the next Multi-Annual Financial Framework. In 2026, work will continue to ensure a firm commitment to stable funding (covering acquisitions, operations, and upgrades) and to industrial considerations, as outlined in the April 2025 Position Paper "Why Europe needs to devise an Industrial Strategy for Space".

The EU Space Act is another file that will carry over into 2026. Three months after the European Commission published its proposal at the end of June 2025, Eurospace got into full gear with the publication of its Position Paper. Widely promoted, especially in the European Parliament, what first and foremost matters for the European space industry is that this regulation increases safety and security in space in an harmonised way at European level, while acting as a catalyst for innovation and new markets.

And to ensure that the future EU Space Act can be implemented quickly and with a minimal level of cumbersomeness, it is key not to reinvent the wheel and to use - and improve - what already exists; for instance, the ECSS standards have recently undergone major improvements. These much-welcomed changes, aimed at making the standards easier to use and updating them to reflect modern industry practices, call for continued support from all actors involved in the process (as emphasised by Eurospace in June 2025).

How can 2025 be referenced without mentioning ESA's Council at Ministerial Level 2025? The largest financial commitment in ESA's history (€22.3 B) reflects Eurospace's July 2025 letter to ESA Member States, calling on them to safeguard the industry's ability to act, thrive, and secure a sustainable future through substantial commitments to ESA. Such a budget increase will inevitably raise questions about the industry's ability to respond to an expanded portfolio of programmes and ensure timely delivery; yet, addressing these questions primarily depends on European institutional actors placing their trust in the European space industry to deliver European systems and services.

Recent U.S. policy shifts underscore the urgency for Europe to strengthen its own space capabilities. With the Executive Order "Ensuring American Space Superiority", the Trump Administration notably turns to the idea of a fee-based Space Situational Awareness (SSA) system to help foster a market for U.S. commercial SSA service providers. This paradigm shift in the approach to space safety highlights the urgent need to strengthen European SSA capabilities (all the more critical given Europe's current reliance on U.S. data) as will be underlined in a forthcoming Eurospace Position Paper in Q1 2026.

Ultimately, it seems that Eurospace isn't ready to retire from its raison d'être just yet!



FILL IN YOUR DIARIES

Public access* Webinar “Newspace by the numbers”

*A free, members-only Eurospace webinar took place on Nov. 20th

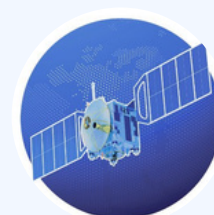
- **Date:** 13 January 2026
- **Location:** Online (Webex)
- **Registration:** [here](#) (see p.9)

ESA Post-CM25 industry event

- **Date:** 14 January 2026
- **Location:** Online
- **Registration:** [here](#)

18th European Space Conference

- **Date:** 27-28 January 2026
- **Location:** Brussels (Belgium)
- **Registration:** [here](#)



HIGHLIGHTS

One year after Eurospace and the Slovak Investment and Trade Development Agency (SARIO) signed a [Joint Statement](#) recognising the importance of emerging space ecosystems for Europe, both organisations invite you to join them at the 18th European Space Conference in Brussels.

On this occasion, a specific session will be organised (**28 January, from 11:00 to 11:30 in The Agora**) where:

- A **White Paper** summarising discussions between leading European space companies and emerging ecosystem actors aimed at identifying new collaboration opportunities, highlighting shared challenges and proposing concrete recommendations to address them effectively will be presented;
- **Signatures on the Joint Statement** will be open: Interested parties will be invited to formally endorse/sign the Joint Statement, expressing their support for its objectives, key messages, and proposed actions. Parties wishing to express advance interest or request further information are kindly invited to let us know in advance.



POLITICAL ENVIRONMENT

EU Space Policy



Programme of the Cyprus Presidency of the Council of the European Union

- The space sector is seen by Cyprus as a strategic asset for the EU as it enables critical services that underpin numerous EU policies while also driving economic growth, creating high-skilled jobs, and supporting industrial development.
- During its Presidency, Cyprus will:
 - “Steer discussions” on the EU Space Act;
 - “Prioritise” advancing negotiations for the Space component of European Competitiveness Fund, as part of the new MFF. The Presidency will notably work to secure continued investment in the Union’s core space capacities and assets;
 - Focus on the forthcoming EUSPA Regulation proposal to strengthen the Agency’s role;
 - Highlight the inclusion of Micro, Small and Medium-sized Enterprises (MSMEs) and start-ups into the space sector by addressing market obstacles, enhancing access to financing and procurement opportunities, and “supporting a diversified and resilient industrial base”.

Space/Defence



Adoption of 2026 European Defence Fund Work Programme

- On December 17th, the European Commission adopted the sixth European Defence Fund (EDF) Work Programme. It addresses 31 topics in total for a total budget of 1B€;
- One call is flagged as “space” (EDF-2026-DA-SPACE-PRS-STEP: Integration of Galileo PRS receivers on weapon systems and NAVWAR operational centres in military C2) for a total budget of 50M€, and covering downstream activities;
- The general objective of this topic is to develop GNSS modules for PRS with NAVWAR capabilities for integration into EU Member States and EDF Associated Countries’ defence systems, and to demonstrate their effectiveness under NAVWAR conditions.



Keynote Speech by Commissioner Kubilius at the ASD Defence & Security Conference

- On December 2nd, European Commissioner Andrius Kubilius delivered a keynote speech at the ASD Defence & Security Conference;
- He notably said that the European Commission shall find some ways to guarantee that big orders will keep coming for industry. For that, the European Commission proposed a five-fold increase of Defence and Space spending in the next EU MFF. He also mentioned the success of ESA CM25 with 22B€ subscribed;
- He also stressed the “positive experience in the development of very successful, collaborative pan-European projects in space”, hoping that it could be replicated by the defence sector;
- Finally, he mentioned the need to counter threats from space, via joint flagship projects built by several Member States (i.e., the EU Space Shield).



POLITICAL ENVIRONMENT

Launchers



New Working Group on Launchers in the EU Space ISAC



- The EU Space Information Sharing Centre (ISAC), a network-based information-sharing platform that promotes collaboration, awareness and best practices among private entities to ensure the safety of our space systems and the networks they rely on, will be launching in 2026 a new Working Group dedicated to “Launch Systems – Space transportation”;
- There are already two existing working groups: one addressing threats in the space environment while the other focuses on standardisation of space-related policies.

Exploration



342nd Council: Media information session



- While updating journalists on key decisions taken at the ESA Council meeting of December 17th & 18th, ESA Human and Robotic Exploration (HRE) Director Daniel Neuenschwander declared that ESA is assessing how to deal with the shortfall, about 800M€ in the Programme, and expect to have a contingency plan ready by February 2026.

Space Safety



Inclusion of additional EU Member States into the EUSST



- With the adoption of its Implementing Decision on December 17th, the European Commission greenlighted the applications of Belgium, Bulgaria, Lithuania and Luxembourg to join the EU SST Partnership;
- The four countries join a network of 15 EU Member States working together to safeguard more than 600 satellites from collisions in space and inform numerous partners on in-orbit fragmentations and uncontrolled re-entries of space objects into the Earth’s atmosphere.

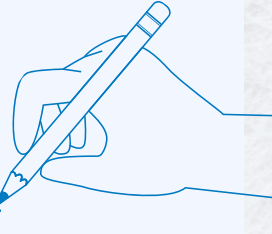


Executive Order “Ensuring American Space Superiority”



- Issued on December 18th, the Trump Administration’s executive order tasks NASA with achieving a crewed lunar landing no later than 2028, followed by the deployment of “initial elements of a permanent lunar outpost” around 2030. It confirms the planned decommissioning of the ISS and calls for the development of a nuclear power capability to support sustained lunar operations;
- Beyond exploration, the order frames space as a strategic domain, calling for the protection of U.S. interests from LEO through cislunar space, greater reliance on commercial systems within national security frameworks, and a comprehensive upgrade of U.S. military space infrastructure;
- The directive further removes language that had required the public sector to deliver “basic space situational awareness services” for free;
- This paradigm shift in the approach to space safety highlights the urgent need to strengthen European SSA capabilities. This effort is all the more critical given Europe’s current reliance on U.S. data.

Briefings



“Advanced information on the EU Space Shield”



The European Commission's "Defence Readiness Roadmap 2030" published in October stated that there was 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, and notably proposed four initial European Readiness Flagships, among which an EU Space Shield.

“Timeline of the EU Space Act and the Competitiveness Fund’s negotiation processes in the European Parliament and Council”



The European Space Act and the European Competitiveness Fund are currently under examination at co-legislator level, namely within the Council’s Space Working Party and the European Parliament’s ITRE Committee.

“Atmospheric Impacts of Re-entry and Launch”



The acceleration of launch activity has triggered heightened interest in the assessment of the deleterious effects of this activity particularly on the ozone layer and the upper atmosphere. The European Space Sciences Committee embraced the issue with ESA in 2022, and the AIRL WG was created with the contribution of international experts.

Reports

“Workshop on Access to space and in-orbit operations”



On December 3rd, the Politecnico di Torino and the Rapporteur for the EU Space Act E. Donazzan (IT, ECR) co-chaired a workshop at the European Parliament on “Access to space and in-orbit operations: technologies and regulations for the next future”.

“Competitiveness Council of December 9th”



On December 9th, the Competitiveness Council took place in Brussels. Ministers welcomed the progress report on the EU Space Act, prepared by the Danish Presidency, and held a policy debate to identify the elements of the proposal aimed at addressing the challenges to overcome.

“ITRE Working Group on Space Policy: Hearing on Space Sustainability”



On December 11th, the Working Group on Space Policy – an informal configuration of the ITRE Committee composed of MEPs working on space topics – chaired by MEP Giorgio Gori (S&D, IT), organised a hearing on space sustainability.



EUROSPACE AT WORK

Eurospace Policy Committee

- The last Eurospace Policy Committee meeting of the year took place on December 2nd. Topics such as the ESA CM25, the European Competitiveness Fund, and an overview of Eurospace's work in 2025 were addressed;
- The next meeting of the PC is planned for January 7th 2026 in Paris.

European Competitiveness Fund

- A revised version of the European Competitiveness Fund (ECF) by the Danish Presidency of the Council of the EU was transmitted to EU Member States;
- Eurospace, via its Policy Committee, analysed the changes and worked on possible amendments.

Space Safety

- In the past months, the Eurospace "Space Safety" Task Force has been working on a Position Paper providing recommendations for the evolution of European Space Situational Awareness sector;
- The paper was approved in December by the Policy Committee. Before being published, it will be formally approved by the Council.

EU Access to space TF

- The new Task Force covering the EU approach to access to space met on November 24th;
- Members notably discussed and reviewed the recommendations made by Novaspace to the European Commission on the topic;
- First inputs from TF members regarding the aggregation of the launch demand and R&D measures were expected for December 17th, before the organisation of a new meeting on January 12th.

Compliance

- During the last Standardisation Working Group meeting of 2026, WG members agreed to produce a final report on ECSS NextGen in order to provide feedback on the deliverable, on how "issue D" will be used inside companies, and on the future steps to ensure the simplification process is efficient in the long run. The report should be drafted and shared early 2026. Regarding the creation of the Industrialisation branch, current priority is reviewing the New Work Item Proposals as they will be used as interface with ESA as a customer;
- Regarding REACH, Eurospace took part as an observer stakeholder to the last SEAC meeting from ECHA, to monitor the potential restriction of PFAS. The European Commission is committed to presenting a proposal "as soon as possible", with the overall objective of minimising PFAS emissions.



SPECIAL FOCUS: 2025, a year in review

As the year drew to a close, it is worth looking back at some of Eurospace's key achievements in 2025:

6 Position Papers



Why a European space industrial strategy matters



The future ESA Programme in Earth Observation: the catalyst for the growth of the European space EO industry



Bridging Horizons: Integrating Space & Defence for a stronger Europe



The next EU Multi-Annual Financial Framework



ECSS: an added-value tool for industry



The EU Space Act

2 High-level Letters



Eurospace support letter for ESA CM25



European Space Associations Joint Letter on an ambitious & ring-fenced EU Budget for Space

55 Briefings, Notes & Reports (including the Facts&Figures and the Global Context Report) & 11 Newsletters distributed throughout 2025

7 events organised or supported & active participation (as speakers) to 53 High-Level Events

+33% increase of LinkedIn followers in one year

5 new members

ALDORIA

Astroscale



LEONARDO

OPEN COSMOS

1 Official Partnership



Joint Statement on European Space Ecosystem Integration Summit with the Slovak Space Office



Webinar: “Newspace by the numbers”

On Tuesday, January 13th 2026 (16:00-18:00 CET), Pierre Lionnet, Eurospace’s Research & Managing Director, will host our second public access webinar on the so-called “Newspace” sector.

The webinar will present a systematic overview of the curated data of the Eurospace “Newspace Observatory”.


The webinar will last approximately 2 hours with a short break in the middle. There will be a time for questions and interaction with the audience of 30 minutes at the end. It will cover:

- **Overview of the global Newspace sector:** total equity raised, total employment, key players, key applications, key sectors;
- **Comparison of European and US newspace sectors;**
- **Deep dive on European newspace:** equity, employment, key players;
- **Other indicators of newspace:** stock performance, private equity capital availability, Chinese newspace indicators.



MORE THAN 40
CHARTS WILL BE
PRESENTED

PARTICIPATION

- This event is available for purchase via “billetweb”. **Three pricing options** are available:
 - **Basic rate (50€):** this fee covers the online attendance to the webex webinar;
 - **Premium rate (100€):** this fee includes the attendance to the live event plus the email release of the PDF slides used throughout the presentation;
 - **Super Premium rate (200€):** this fee includes attendance to the online webinar + the presentation material provided as a powerpoint file (with all source data for charts available)
- The webinar will be streamed via  webex by CISCO
- Participants will need to log into Webex with the email address used to register for the event. Only one log will be authorised per email address.



REGISTER NOW



PROMOTING OUR MESSAGES TO THE GENERAL PUBLIC

IndustriAll Europe Space meeting (01/12/2025)

Eurospace Secretary General Olivier Lemaitre presented an overview of the European space sector current developments, including the ESA CM25 and the next EU MFF, during the space meeting of IndustriAll Europe, the European trade union association.



Meeting with AIRL WG (03/12/2025)

Eurospace executive met with representatives of the AIRL (Atmospheric Impact of Re-entry and Launch) Working Group, that was created to pursue a more systematic approach for assessing the measurable impact of atmospheric re-entry and launch activities, including by direct in situ measurement.



Lunch Debate “Space challenges for the EU” (08/12/2025)

Eurospace Policy Director Charles Galland participated to a lunch debate organised by I.R.C.E (Institut de Recherche et de Communication sur l'Europe) centred around the challenges for the EU in space. EUSPA Executive Director Rodrigo Da Costa was guest of honour.



Parliamentary breakfast on the EU Space Act (09/12/2025)

Policy Director Charles Galland was invited by MEP A. Niebler, Shadow Rapporteur for the EU Space Act, to a parliamentary breakfast co-organised with BDLI, where he highlighted four critical issues in the current text: equivalences, derogations, excessive red tape, and the danger of competitive distortions within the Union itself.



Eurospace capabilities on space economics monitoring and assessment (10/12/2025)

Research & Managing Director Pierre Lionnet was invited by the French Space Agency's team in charge of Strategy and Ecosystem in view of reviewing and discussing the main challenges for the elaboration of space economics and market monitoring tools with a view of sharing best practices.





PROMOTING OUR MESSAGES TO THE GENERAL PUBLIC

ITRE Working Group on Space Policy (11/12/2025)

On December 11th, Olivier Lemaitre, Secretary General of Eurospace, was invited by the Chairman of the ITRE Working Group on Space Policy, MEP G. Gori, to a meeting of the Working Group centred on “sustainability in space”.



ESA LSIs & Midcaps Fora (15/12/2025)

On December 15th in ESA HQ in Paris, Secretary General Olivier Lemaitre and Policy Director Charles Galland participated to the Large Systems Integrators (LSIs) and Midcaps Fora. Topics such as a debriefing of the last CM25, topics of interest for industry and challenges encountered were at the agenda of both meetings.



Strategy and Innovation Seminar (17/12/2025)

Research & Managing Director Pierre Lionnet was invited by the ArianeGroup’s Strategy and Innovation team for a presentation and discussion around the future of access to space, including launch previsions, market prospects, and positioning for ArianeGroup.



Opinions from Eurospace executive

[“Risks and wins from the latest CM25”](#) by Charles Galland for The Space Republic



ASD-EUROSPACE
The Space group in ASD

RUE DU QUATRE SEPTEMBRE 22 | 75002 PARIS | FRANCE
RUE DU TRÔNE 100 | 1050 BRUSSELS | BELGIUM

FOLLOW US

