

JUNE 2026, ISSUE #140

EUROSPACE POLICY NEWSLETTER

Our monthly spotlight on the European space scene

THIS MONTH IN OUR NEWSLETTER

The presentation of the
Eurospace annual Facts
& Figures Report

The Report on the sixth
European Space Forum

The first bilateral
meeting between ESA
D-TEC and Eurospace

A special focus on
global GNSS spacecraft
output

Your usual columns:
editorial, political
environment...

EDITORIAL

By Pierre Lionnet & Ilona Zabrytska

“Thirty years is a long time to keep counting, long enough to have watched the Eurospace Facts & Figures report grow into the sector’s annual rite of passage. This year’s edition marks its 30th anniversary, timed for release just as we begin contemplating the countdown to the summer break. Thirty years of data also means thirty years of companies’ trust and goodwill: our response rate this year again reached an excellent level, with questionnaires returned covering 54.4% of total employment and 80% of final sales. By sourcing publicly available sales and employment information from additional companies, we brought total coverage to 76% of employment and 90% of final sales.

Zooming out to the full thirty-year period, the picture is one of transformation: the European space industry has nearly doubled its level of employment, and more than tripled its revenues (in current economic conditions). In 2025 industry posted much higher revenues than the previous years, getting near the €11B ceiling for final sales after more than a decade of relatively stagnating results. More specifically, sales reached €10.9 billion (up 23%) while total employment grew by 2% to 68,000 FTE. These are current economic conditions, so the “real” growth is somewhat more modest but the increase is noteworthy. The engine behind this surge is clear: European institutional programmes, which account for 67% of the industry’s final sales, grew by 18%, an increase of €1.1 billion in revenues, and by far the largest contributor to 2025’s growth. This growth was mostly fuelled by ESA (+564M€), military programmes (+338M€) and national civil programmes (+210M€).

In the ESA segment, most of the growth was driven by Scientific and Exploration programmes. In 2025, ESA invested much more in science and exploration programmes (notably the Exploration Envelope Programme) with a massive surge in related revenues in the industrial sector (+73%). With 7 launches in 2025, the business with European launch services operators also improved significantly. In contrast, the revenues from launcher development programmes have remained quite stable. The launcher business also profited from a favourable export environment (European launcher fairings are exported notably to the USA and to Japan) that sustained revenues in the segment. Satellite applications, for their part, still represent the largest revenue segment for the European industry, generating almost €5 billion in 2025 and growing 21%, powered by both commercial and institutional demand at home and abroad. The growth of military demand for satellite programmes is worth noting, with a marked growth in remote-sensing systems, and growing earth observation demand is also translating into a meaningful uptick in export sales.

Beyond the headline numbers, the results of the 2026 survey seem to confirm our analysis of global trends: shifting political priorities in European space programmes in a context of increased institutional spending, and the globally receding trends in traditional commercial satellite segments (and in particular the large GEO paradigm). Europe’s launcher business, meanwhile, is finding renewed momentum, with the positive impact of European launchers’ surge in revenues supported by European captive institutional demand and the commercial prospects offered by the deployment of constellations, in particular Amazon Leo, which is a key customer for Ariane 6.

Thirty years of Facts & Figures tell us that the numbers may finally give us reason to sit back and enjoy the summer. Eurospace wishes you a well-deserved summer break. ”



Eurospace Facts & Figures 2025

On July 7th 2025, Eurospace presented to the Press the 30th edition of the **Eurospace annual facts & figures survey**. The report establishes the reference measure of European space systems manufacturing industry economics, with detailed analysis of industry revenues, by product and customer segments, and of direct industry employment, including the age and qualification structures, and the distribution between European countries and corporate structures.

The press release of the f&f report is available on our website ([here](#)), and the recording of the press conference on our YouTube channel ([here](#)), allow us to present you the **4 main trends of the European Space Industry in 2025**:

1

A growth (again) in employment

Employment figures are still in growth now topping at **68,100 FTEs in 2025** (last year, this number was reaching 66,600 FTEs). Most of the growth, which is proportionally slower than the growth of revenues, is fuelled by the **major hiring spree of newcomers in the sector** (the segment now represents 18% of total industry employment), and to a lesser extent by midcaps.

2

A significant growth in sales

The European space industry has registered a **growth of sales** (+2B€ compared to last year), to 10,9B€ in 2025. Final sales to European institutional programmes have registered a 18,5% YoY increase from 6450M€ in 2024 to 7645M€ in 2025.

3

Labour productivity is on the rise

With sales growing at a faster rate than employment, the apparent **labour productivity is on the rise in 2025 (160k€/FTE)**, a 16,4% increase compared to 2024. This productivity level is attained thanks to the business provided by European institutional players. Apparent labour productivity increase is perceived across all industry from large groups to start-ups and SMEs.

4

Public customers as the largest contributors to space industry revenues

The sales of the European space industry are located **mainly in Europe** (82% of final sales) while exports represent a smaller, but significant share (18%). The sales of the European space industry are mostly associated to **public customers** (i.e. state-controlled/owned entities): they represent 73% of final industry sales. Private customers represent a significant, though lesser, share of European space industry sales, worth 27% of final industry sales.



FILL IN YOUR DIARIES

Farnborough International Airshow

- **Date:** 20 July - 24 July
- **Location:** Farnborough (UK)
- **Registration:** [link](#)



ESA High Level Forum with Industry

- **Date:** 3 September
- **Location:** Paris (FR)
- **Registration:** on invitation



ESA Industry Space Days

- **Date:** 16-17 September
- **Location:** Noordwijk (NL)
- **Registration:** [link](#)



2nd EU Access to Space Conference

- **Date:** 23 September
- **Location:** Brussels (BE)
- **Registration:** [link](#)



HIGHLIGHTS

On June 29th, Eurospace Council & General Assembly members met in Brussels and online, under Marco Fuchs' Presidency. They notably:

- Discussed the figures of the 30th edition of the Eurospace facts & figures Report, highlighting that current trends in the European space sector show unprecedented growth in sales.
- Talked about the priorities of the first Semester of 2026 which will continue to be priorities in the second Semester too, including the GALAXY Report, the EU Space Shield, EU Access to Space, Industry Relationship with ESA D/TEC, the preparation of the next MFF, the EU Space Act, and the Space Partnership;
- Welcomed the full membership of Leaf Space, Space Industries and ExoTrail;
- Discussed the financial stability of the Association with Council members welcoming the efforts of the Eurospace Executive to contain costs and for the great management;
- Approved the Eurospace Management Report, taking note of the quantity and quality of the work of the Executive in 2025.



POLITICAL ENVIRONMENT

EU/Canada



EU-Canada Space Dialogue



On June 8, the EU-Canada Space Dialogue took place at the European Commission. Commission's DG DEFIS, Canadian Space Agency and industry representatives took part in it. Worth noting:

- DG DEFIS stressed the need for strategic partnerships with trusted partners like Canada, requiring alignment on procurement pathways and recognition of standards;
- CSA flagged EO as a core national capability, with the Arctic a key focus, and optics as a strategic area for EU-Canada collaboration;
- On mutual market access, DG DEFIS noted new programmes could open future opportunities, with speed as a key factor. Ready-made solutions in either market could be contracted by the other;
- Industry asked for clearer guidance on what falls under Canadian sovereignty versus what can be shared with foreign players, to ease market entry;
- Given strong industry interest, a follow-up dialogue may be organised soon; DG DEFIS is also exploring a similar dialogue with Australia.

STM



EU space operators agree on the civilian-military requirements on Space Traffic Management



On June 15, DG DEFIS and the EEAS announced that 21 EU (and Norwegian) civilian operators and their 14 military counterparts, coordinated by the European Defence Agency, agreed on the final version of the Report aggregating civilian and military requirements of space operators on space traffic management, marking a key milestone for STM in Europe. Worth noting:

- The report is the result of two years of close cooperation, with civilian operators contributing through Subgroup 1 of the STM Stakeholder Mechanism and military input gathered by the EDA, before DG DEFIS and EEAS aggregated the requirements of both operator communities, accompanied by common in-orbit scenarios;
- The requirements complete "Action 1" of the Joint STM Communication (2022), being a major milestone in implementing the EU's STM approach.

EU/Parliament



State of the art of the European Parliament negotiations on the European Competitiveness Fund & the EU Space Act

- The ECF Programme, which includes the future Space Programme, is nearing finalisation in ITRE Committee negotiations, led by Rapporteurs C. Ehler (EPP) and D. Nica (S&D, RO). The main friction among Shadow Rapporteurs concerns the eligibility conditions set out in Articles 69 and 11 for associated countries. The vote in ITRE Committee is expected in September 2026.
- The EU Space Act is undergoing technical negotiations, with Rapporteur E. Donazzan's (EPP, IT) team leading discussions on the Sustainability and Safety Pillar. The main technical aspects of the three pillars are to be discussed before the summer break, while political topics (equivalence, exceptions) will be addressed from September onwards. The vote in ITRE Committee is expected in November 2026.



POLITICAL ENVIRONMENT



European Parliament Hearing

“Securing Europe’s Eyes in the Sky: the Security of EU Satellites”

On July 1, an EPP Group hearing on the security of EU satellites took place in the European Parliament in Brussels, organised by the EPP Group (ITRE and SEDE coordinators). The hearing addressed growing threats to EU space infrastructure (proximity operations, jamming, spoofing and communications interception) and whether current EU space governance is adequate to maintain services in a crisis. Speakers represented EDA, Belgian Defence, EUSPA, ESA and DG DEFIS. Worth noting from Commissioner Kubilius’s opening remarks:

- Infrastructure targets are shifting to space, as shown by the KA-SAT malware attack;
- The EU faces rising interference: 50,000 flights affected in 2025, a fivefold rise in Baltic RF interference, and repeated suspicious satellite proximity operations;
- Three threat categories: electromagnetic interference, AI-driven cyber attacks, and physical/proximity threats, complicated by the difficulty of distinguishing legitimate in-orbit activity from hostile intent;
- Space defence should mirror ground defence principles: detection (SSA, RF monitoring, EU Space ISAC), resilience (Govsatcom, IRIS²), and mobility (in-space transport and launch capacity, still a gap for Europe);
- A European Space Shield action plan is expected this year;
- Underinvestment in space defence would cost far more, Europe needs an ambitious space and defence spending in the next MFF.

ISOS



Signature of the ISOS Joint Declaration

On June 10, at the International Airshow in Berlin, the EU and Greece, Italy, the Netherlands, Sweden and Norway signed a joint declaration in support of the In-Space Operations and Services (ISOS) pilot mission, a step towards a European in-orbit service infrastructure. Worth noting:

- Germany, France, Luxembourg, Portugal and Spain had already signed the declaration last year, and it remains open to further signatures; the European Commission and ESA also signed it, sealing their long-standing in-space cooperation;
- ISOS aims to give Europe capacities for in-orbit tasks such as satellite capture and repositioning, inspection and repair, in-space logistics, manufacturing and debris removal, helping operate, service and extend the lifecycle of space systems;
- Commissioner Kubilius said Europe is taking the first step towards building a new capacity for in-space operations and services, creating new business opportunities;
- Following the signing, six Horizon Europe projects were launched to implement the ISOS Pilot Mission, coordinated by Thales Alenia Space (FR), Leonardo (IT), The Exploration Company (DE), ArianeGroup (DE), Planetek (IT) and RWTH Aachen University (DE).



POLITICAL ENVIRONMENT

Space/Defence



Commission proposes five joint defence projects (EDPCIs) to strengthen Europe's industrial capabilities



On July 3, the European Commission submitted to the Council a proposal for an implementing decision, proposing five European Defence Projects of Common Interest (EDPCIs), covering drones and counter-drone systems, maritime and seabed defence, space, air and missile defence, and security along the EU's Eastern Flank. Worth noting on Space:

- The Space EDPCI targets Space-Based Early Warning, SATCOM, ISR (including SIGINT), Space Domain Awareness, PNT/NAVWAR, Responsive Space Systems and a multi-mission approach, aiming to mobilise (including MS funding) up to €24 billion by 2034;
- Activities would entail mostly common procurement of defence products & capabilities (including necessary infrastructure): PRS receivers, SATCOM LEO terminals, common military planning tool for SATCOM resource sharing, ISR capabilities (optical, SAR, SIGINT), SDA capabilities (C2, ground-based and space-based sensors), NAVWAR detection and denial capabilities;
- It takes into account relevant PESCO projects and aims to reinforce Member States' capabilities and interoperability consistent with NATO activities, and involves 16 countries;
- €325 million is earmarked for the five EDPCIs under EDIP through end-2027, with the Space EDPCIs seeing allocation of both big and small tickets funding;
- Next, the Council will discuss formal establishment of the EDPCIs, defining objectives, participating countries and expected investment; once adopted, projects become eligible for EDIP funding, laying the ground for further support via the upcoming ECF Programme.

Access to Space



European Flight Ticket Initiative opens to more launch service providers



On June 26, the European Commission and ESA opened the European Flight Ticket Initiative to additional launch service providers. Worth noting:

- The new call for proposals has two parts: widening the pool of launch providers eligible for future Flight Ticket missions through framework contracts with ESA, building on the four companies (Avio, Isar Aerospace, PLD Space and Rocket Factory Augsburg) selected in 2024, and awarding launch services for six IOD/IOV missions from the fifth batch, already shortlisted and ready for launch;
- The Commission is encouraging additional European companies expected to be launch-ready before 2028 to apply, with both existing and newly selected providers eligible to compete for the six missions;
- The Commission's Director for Secure and Connected Space, Catherine Kavvada, said the timing is right to extend the initiative to new launch providers, expecting it to attract emerging European launch companies and create more IOD/IOV flight opportunities;
- Proposals are due by 17 July 2026, 13:00 CEST.



POLITICAL ENVIRONMENT

ESA Council



ESA 347th Council Outcomes

The 347th ESA Council meeting took place on 16-17 June at ESA Headquarters in Paris, chaired for the last time by outgoing Council Chair Renato Krpoun, whose successor Juan Carlos Cortés took over on 1 July. Worth noting:

- **Christine Klein** was appointed Director of Controlling, Finance and Operational Procurement (effective 1 July 2026), and **Jean-Luc Trullemans** as Director of Strategy, Legal and External Affairs (effective 1 January 2027);
- Member States agreed that the Interim Council meeting at Ministerial level will be held in December 2026 in Italy. The Interim Ministerial will provide an important opportunity for Member States to define the **European exploration roadmap for the coming years**;
- Following March's endorsement of the EPIC (ESA Provided Institutional Crew) mission concept, ESA was authorised to enter negotiations with potential partners and providers;
- Greece's national satellite programme support was extended until 2031 with an additional €361 million, covering Earth observation, telecommunication and SSA activities;
- The Council approved public release of the **status report on Space Safety**.



EUROSPACE AT WORK

Eurospace Policy Committee

- The last Eurospace Policy Committee meeting took place on July 7th. Topics such as the European Competitiveness Fund, the EU Space Act and the EUSPA Regulation were addressed. SG O. Lemaitre debriefed members on the bilateral meeting between Eurospace and ESA D/TEC, and on the bilateral meeting with DG DEFIS's Director General Timo Pesonen.
- The next Policy Committee meeting will take place on 8 September via Webex.

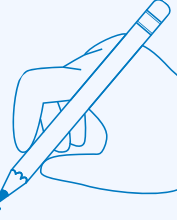
EU Access to Space TF

- In view of the preparation of the ESA-EU Joint Vision on Access to Space, and the upcoming publication of a Joint Document in Autumn 2026, during the last Policy Committee meeting Members agreed to reconvene the task force and provide input to the two institutions.

ESA D-TEC / Eurospace bilateral meeting

- The bilateral ESA D-TEC meeting took place to establish a dialogue on R&D issues between ESA and industry. O. Lemaitre explained that Industry felt that the topic of R&D had fallen below the radar, since the focus from the Member States had been to deliver programmes quickly, while for Industry the focus was on negative profitability, which prevented investment in R&D. The goal is to establish a dialogue and to allow ESA to explain to stakeholders its activities and how industry can support them, to prepare for the next CMIN, and to discuss the co-programmed partnership. ESA representatives expressed their interest in collecting comments and triggering discussions. ESA presented the Accelerated initiative and an overview of current R&D activities. Eurospace presented the industry's priorities regarding ECSS/standardisation and the next (tbc) Space Partnership. Minutes have been circulated.

Briefings



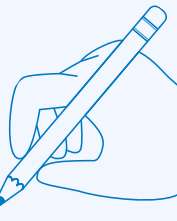
Council's partial General Approach on the European Competitiveness Fund (ECF) regulation

On 16 June 2026, the General Affairs Council endorsed a partial General Approach on the European Competitiveness Fund (ECF) regulation. The text is based on a revised compromise proposal issued by the Cyprus Presidency following Coreper discussions on 29 May and 10 June 2026. The Council position is “partial” because it excludes financial and horizontal issues, which are currently being discussed as part of the overall negotiations on the next multiannual financial framework (MFF) covering the period 2028 to 2034. The partial negotiating position is the Council's mandate to start negotiations with the European Parliament on the ECF. The briefing provides a comparison of the “Space Window” (Section III, Chapter VII, ECF) between the initial Commission's proposal and the Council's position.

EU Space Shield Consultations

The European Commission is expected to publish its Joint Communication on the EU Space Shield in autumn 2026. In the meantime, DG DEFIS and the EEAS are holding workshops with Member States to define the initiative's key concepts and discuss its scope and governance. This briefing summarises the main papers submitted to delegations during the Space Shield talks, offering an overview of the topics under discussion.

Reports



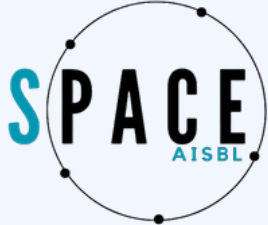
ESA info session: European Space Sector Decarbonisation Roadmap

On 1 June, the European Space Agency held an industry information session on the development of a “European space sector decarbonisation roadmap.” ESA's Director General has been formally mandated by Member State ministers to produce this roadmap in collaboration with industry and the European Commission. The session gathered input from across the European space industry to help shape the roadmap's design and scope ahead of the formal working group phase. The finished roadmap is due to be presented at the ESA Ministerial Council in late 2028.

Sixth European Space Forum

On 30 June and 1 July, Brussels hosted the sixth edition of the European Space Forum. Eurospace has since produced a report synthesising the key points discussed across the sessions.

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).

WHAT HAPPENED LAST MONTH?

June brought heatwaves across Europe, and the Space Partnership experienced some rising temperatures too. The preparation and presentation of our initial ideas on a potential future Space Partnership to the State Representative Group (SRG) took centre stage this month. The SRG Meeting on 24 June marked an important milestone, with a first opportunity to share these ideas with Member State counterparts and Commission partners alike.

The meeting was a positive and constructive exchange. Plenty of questions, and further branding and narrative ideas emerged from the discussions, notably around the themes of enabling technologies, technological and pre-operational demonstrators for new space capabilities, and a new in-space economy. Now the focus is on refining the SRG slides, with an internal deadline set for mid-July ahead of the next SRG meeting. The next SRG meeting is expected for mid-September.

WHAT IS COMING UP?

July brings a quieter agenda with the summer break on the horizon. Weekly coordination meetings will continue every Tuesday from 09:30 to 10:30 until mid-July, before pausing for the summer and resuming at the end of August.

The priority for July is supporting the update of the SRG slides in preparation for the September meeting. Details will be discussed during the weekly meetings, and partners are encouraged to contribute.

There is also a new reporting requirement from the European Commission: an interim self-assessment evaluation, our preliminary input is due by 15 July. Further details on the scope and process will be shared shortly, no action is needed as the input will mostly be based on previous reporting requirements that were already submitted.

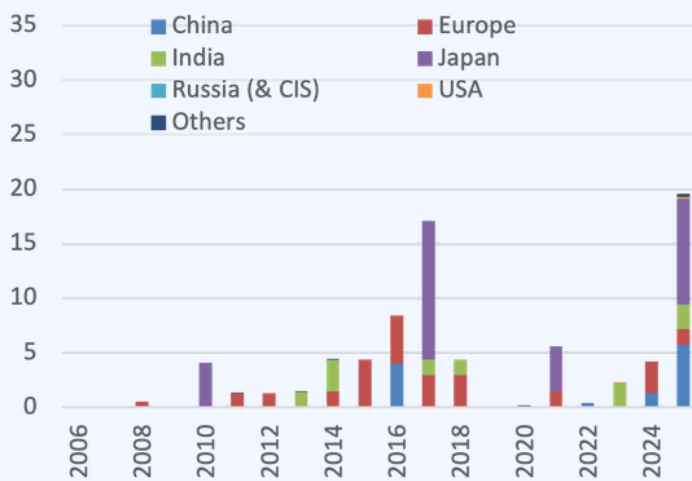
Follow the Space Partnership on [Linkedin](#) and its [website](#) for further updates. If you have any questions, please contact jean-charles.treuet@eurospace.org or lea.kessler@eurospace.org directly via email.



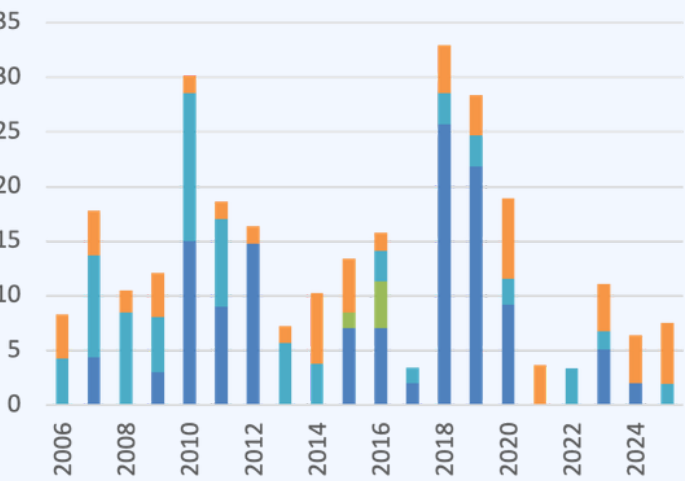
SPECIAL FOCUS: 2006 – 2025 A QUICK LOOK AT GLOBAL GNSS SPACECRAFT OUTPUT

GNSS (Global Navigation Satellite System)

Civil GNSS spacecraft launched mass (tonnes)



Military GNSS spacecraft launched mass (tonnes)



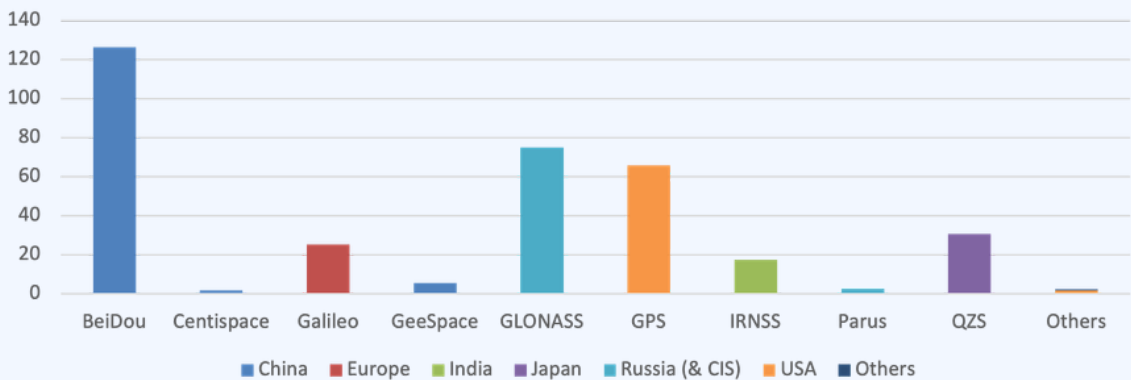
Navigation with weather forecasting has become one of the most essential space-based services. It is a particular space application as it doesn't require the deployment of heavy space infrastructure unlike LEO broadband. In total since 1959, there have been 710 tonnes of navigation spacecraft launched, 49.6% of which were launched in the past twenty years.

Historically, navigation is a military space application. The first satellite navigation system was the Transit programme which was developed and operated by the US Navy deployed as early as in 1959. It was followed by other military navigation constellations such as the US GPS constellation in 1978, the USSR's GLONASS in 1982 and China's BeiDou in 2000.

Navigation spacecraft are also deployed and operated by civil entities. The first of which was the European Union's Galileo constellation first deployed in 2005. In the past twenty years, there were 80 tonnes of civil navigation spacecraft launched compared to 276 tonnes of military ones.

In recent years, we notice the emergence of commercial navigation spacecraft operators. The most significant advances are happening in China with LEO constellations such as Future Navigation Technology's Centispace or automotive giant Geely with its subsidiary GeeSpace which has launched 5.6 tonnes of spacecraft between 2024 and 2025 to support its growth.

2006-2025 GNSS constellations launched mass (tonnes)





PROMOTING OUR MESSAGES TO THE GENERAL PUBLIC

ISPI-ESPI Roundtable (17/06/2026)

On 17 June, Secretary General O. Lemaitre took part in the ISPI-ESPI roundtable in Brussels, on the panel "Between Protection and Openness: Europe's Space Policy at a Crossroads" alongside representatives from ESA and DG DEFIS. He explained that, in Europe, it is no longer possible to consider space as a vital element of sovereignty and growth without also recognising the need for an industry capable of delivering the capabilities deemed indispensable by public authorities. And therefore, it is not sustainable to continue to have a space policy lacking a dedicated industrial policy.



Logos Policy Breakfast (24/06/2026)

On 24 June, Secretary General O. Lemaitre took part in the second edition of the "European Space Hub" organised by Logos, the breakfast roundtable bringing together institutional and industry voices to discuss the future of Europe's Earth Observation capabilities. The focus was on how to build a secure, sovereign and responsive EO system that meets evolving government needs. Discussions centred on closing capability gaps, securing funding (including via the future European Competitiveness Fund), and designing modular, federated and interoperable architectures linking institutional, national and commercial capabilities.



European Space Security and Defence Forum (02/07/2026)

On 2 July, Secretary General O. Lemaitre took part in the European Space Security and Defence Forum, speaking on the competitiveness panel. He defined competitiveness as the ability to win contracts on open markets, noting these markets are small and largely closed, with the US protected and China closed by design. Europe once generated around half its turnover from commercial geostationary telecoms, but now derives 71% of turnover from the institutional market following that market's collapse. He argued the widely cited \$1.8 trillion space economy doesn't reflect revenue captured by the space industry but an induced economy, with competitiveness mattering chiefly to keep European institutional customers from buying elsewhere.





PROMOTING OUR MESSAGES TO THE GENERAL PUBLIC

EU Space Forum (01/07/2026)

On 1 July, Secretary General O. Lemaitre took part as moderator in the panel "Session 2: Funding Ambition – Reflecting on Landmark Investment in Europe's Space Sector", exchanging ideas with representatives from ESA, the European Parliament and DG DEFIS, and representatives from public and private investors. His key takeaway: industry benefits from predictability: on policy direction, on the regulatory framework, and of course on demand.

Policy Manager I. Zabrytska took part in the panel "Session 7: Navigating the Evolution of Space Sustainability and Space Traffic Management". She stressed that the EU Space Act could prove pivotal for commercial SSA providers, as it may determine whether they can operate as recognised safety service providers alongside EU SST.



CONFERS (07/07/2026)

On 7 July, Director Pierre Lionnet was invited by CONFERS to present an overview of the economics of On-Orbit Operations Missions, based on quantitative elements sourced from the Eurospace LEAT database and the NewSpace Observatory.



Facts & Figures press release (07/07/2026)

On 7 July, Eurospace hosted the presentation of the annual Facts & Figures survey results. The event was hosted by Director Pierre Lionnet and gathered about 50 participants online, including representatives from the press, from Eurospace members, and from European institutions.



ASD-EUROSPACE

The Space group in ASD

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