



ESPI

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POLICY & PROGRAMMES

The White Paper on European Defence highlights space as a strategic priority

The European Commission's Joint White Paper on European Defence (Readiness 2030) highlights space as a strategic domain crucial to Europe's security and autonomy. It identifies space assets as part of the "strategic enablers and infrastructure protection" capability gap, underscoring their role in secure communications, surveillance, and resilience. The paper also emphasises the integration of Ukraine into the EU's defence industrial base, including access to space-based services. To ensure reliable connectivity for Ukrainian forces, the Commission proposes funding Ukraine's access to satellite internet via European providers, reducing reliance on non-EU networks. The European Investment Bank has also committed to boosting its annual defence-related funding to €2 billion, with targeted support for space, cybersecurity, drones, and emerging technologies, backed by a new policy goal focused on peace and security.

ESA Council adopts Strategy 2040 and expands global partnerships

At its 332nd meeting on 19-20 March 2025 in Paris, the ESA Council adopted ESA Strategy 2040, laying out five long-term goals focused on planetary protection, European competitiveness, and leadership in space. The Five Goals focus on the role of space in the everyday lives of European citizens. They include: (1) Protect our Planet and Climate; (2) Explore and Discover; (3) Strengthen European Autonomy and Resilience; (4) Boost Growth and Competitiveness; (5) Inspire Europe. The strategy will guide preparations for the November Ministerial Council and is intended to evolve over time. Renato Krpoun was reappointed as Council Chair, with Frank Monteny and Juan Carlos Cortés Pulido continuing as Vice-Chairs for an additional year from July 2025. The Council also advanced several international partnerships. ESA and JAXA have extended their EO agreement on the use of SAR satellites through until 2027 and will sign a new ten-year climate-focused strategic partnership. ESA's cooperation agreement with Brazil has been renewed until 2035, and a new MoU has been signed with the African Union to support joint activities under the EU-Africa Space Partnership. A separate Statement of Intent between ESA and JAXA will also enhance collaboration on human and robotics exploration, including lunar surface operations and system interoperability.



UK MoD awards CGI UK with £65 million contract for satellite monitoring system

The UK Ministry of Defence has awarded CGI UK with a £65 million contract to develop the Borealis command and control system, which aims to enhance the UK's capabilities in satellite monitoring and protection. Borealis will improve decision-making and support military operations by compiling and processing data from multiple sources and providing enhanced space domain awareness, including space debris and threat monitoring.



NASA astronauts return to Earth after nine months in space

NASA astronauts [Suni Williams](#) and [Butch Wilmore](#) have returned to Earth on a SpaceX capsule after spending nine months in space. The two astronauts had expected to be away for just over a week after launching on Boeing's new Starliner crew capsule on 5 June 2024. However, technical problems on the way to the International Space Station caused NASA to send Starliner back empty. The astronauts ended up spending an unexpected 286 days in space, orbiting Earth 4,576 times, representing the largest and most uncertain extension of a space mission to date. The astronauts landed aboard a SpaceX Dragon spacecraft in the Gulf of America on 18 March 2025.

Norwegian Space Agency signs contract with Isar Aerospace

The Norwegian Space Agency has contracted European satellite launch service company [Isar Aerospace](#) to launch its Arctic Ocean Surveillance (AOS) satellites. The launch vehicle "Spectrum" will carry two satellites to sun synchronous orbit from Isar Aerospace's launch complex at Andøya Spaceport in Norway. The launch is scheduled for 2028 and will represent a major milestone for Norwegian space activities. The two AOS satellites will include AOS-Demo for maritime monitoring and AOS-Precursor, which is the first operational satellite of the system.

ESA awards SSC with satellite ground station contracts for Copernicus

ESA has awarded new contracts to the [Swedish Space Corporation](#) to expand ground station support for the EU's Copernicus EO programme. Building on their partnership since 2020, the new agreements include additional support from ground stations in Chile, the USA, and Canada. The expanded contract involves commissioning and routine support for Sentinel-1C and Sentinel-2C satellites, with operations covered from SSC's ground stations in Inuvik, Esrange, and Punta Arenas, as well as extended support for Sentinel-1A and 2B until November 2026.

Canada selects Exolaunch for CubeSats deployment



Credit: Exolaunch

The Canadian Space Agency has signed a Launch Services Agreement with [Exolaunch](#) to deploy nine 3U CubeSats developed by Canadian universities as part of the CUBICS initiative, Canada's national programme to advance STEM education through space missions. The 3U CubeSats will launch via a rideshare mission no earlier than mid-2026, with integration at CSA's Quebec facilities. Exolaunch will provide mission integration, testing, and deployment using its advanced EXOpod Nova separation system.

ESA signs contract with Thales Alenia Space for digital twin development

ESA has contracted [Thales Alenia Space](#) to lead [SaveCrops4EU](#), a pre-operational digital twin component under ESA's Digital Twin Earth programme. The project aims to enhance agricultural resilience to climate change through satellite-based monitoring, crop yield forecasting, and stress scenario simulations. Integrated with real-world validation in Belgium, Germany, Hungary, and Spain, the system supports sustainable crop management in line with the EU Green Deal and Common Agricultural Policy. The modular design ensures future scalability and alignment with broader initiatives like Destination Earth.



ESA and European Commission to develop European EO resilience system



European Commission/ESA

ESA Director General Josef Aschbacher and European Commissioner for Defence and Space Andrius Kubilius held a bilateral meeting focused on space for security, dual-use, and exploration. A key outcome was the launch of a joint ESA-European Commission Task Force to develop a European EO resilience system, set to evolve into a broader system of systems integrating secure communications, navigation, AI, and edge computing. Increasing geopolitical challenges led both sides to emphasise the urgency of turning shared visions into concrete action to strengthen Europe's unity, independence, and resilience.

NASA initiates Workforce Reductions

NASA has begun Reductions-in-Force at its headquarters in response to a Trump Administration Executive Order, closing the Office of Technology, Policy, and Strategy, the Office of the Chief Scientist, and the Diversity, Inclusion and Accessibility Branch of the Office of Diversity, Equity, and Inclusion. The cuts follow the Trump Administration's executive orders to reduce government spending and eliminate DEIA programmes. The changes, effective April 10, 2025, affect approximately 23 employees and is expected to cost NASA an estimated \$1.17 million in severance and related expenses. Acting NASA Administrator Janet Petro framed the cuts as part of an effort to streamline operations.

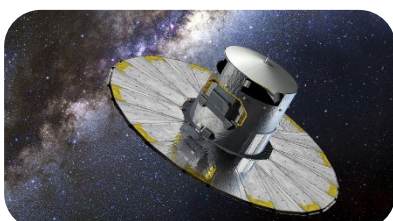
Japanese MoD awards Astroscale Japan with contract

The Japanese Ministry of Defence has awarded Astroscale Japan with a €47 million contract for the development of a responsive space system demonstration satellite prototype. The project, scheduled between March 2025 and March 2028, will involve the development and testing of a proto-flight model for a small geostationary demonstration satellite. A separate contract will cover the launch and operations phases, during which the satellite will demonstrate technologies to expand space domain awareness (SDA), surveillance, intelligence gathering, and space operations.



Credit: Astroscale

Gaia Mission nears end after transforming our view of the Milky Way



Credit: ESA

ESA's Gaia observatory was switched off on 27 March 2025, marking the end of over a decade of groundbreaking astronomical observations. Launched in 2013, Gaia has recorded the positions, motions, and properties of nearly two billion celestial objects with unprecedented precision, reshaping our understanding of the Milky Way's structure and even detecting dormant black holes. Through scientific operations ended in

January 2025, data analysis will continue through until 2030, culminating in the most detailed star catalogue to date.



NASA awards Firefly Aerospace with contract to launch INCUS mission

NASA has awarded Firefly Aerospace with a VADR contract to launch the Investigation of Convective Updrafts (INCUS) mission from the Wallops Flight Facility in Virginia. INCUS forms part of NASA's Earth System Science Pathfinder programme and consists of three satellites designed to study tropical storm formation and improve climate change models. Firefly's Alpha rocket will enable precise orbital placement to support scientific research.

Senators introduce NASA authorisation bill

A bipartisan group of Senators have introduced a 2025 NASA Authorisation Bill. The bill includes NASA's Artemis programme to return astronauts to the Moon and explore Mars, as well as private sector partnerships. Co-sponsored by the Chair and Ranking Member of the Senate Commerce, Science, and Transportation Committee, Sen. Ted Cruz, and Sen. Maria Cantwell, among others, the bill authorises \$25.478 billion for NASA. It emphasises priorities, such as sustaining the ISS, advancing lunar capabilities, developing hypersonic technologies, and enhancing planetary defence. While authorisation bills recommend levels of funding, they do not provide actual funding. However, the bill reaffirms support for the Space Launch System (SLS), the Orion spacecraft, and a balanced science programme, whilst promoting the growth of a commercial space economy.

UK military satellite SKYNET 6A passes initial testing phase

UK Ministry of Defence satellite communication capability SKYNET 6A has completed its initial testing phase at the National Satellite Test Facility in Oxfordshire. SKYNET is the UK'S satellite communication system, delivering secure information to the UK and allied forces globally. Scheduled for launch in 2026, SKYNET 6A aims to provide enhanced digital processing and greater versatility compared to previous satellites, supporting military operations for at least 15 years. The programme represents the largest government investment in the UK space industry.



Credit: National Satellite Test Facility

U.S. Space Force selects Gravitics for \$60 million STRAFTI



Credit: Gravitics

The U.S. Space Force has selected Gravitics for a Strategic Funding Increase (STRAFTI) worth up to \$60 million to develop and demonstrate its Orbital Carrier. Designed to pre-position manoeuvrable space vehicles, the Orbital Carrier offers rapid, flexible in-space deployment capabilities, enhancing the U.S. Space Force's tactical responsiveness and space defence posture. The funding combines government, SBIR, and private investment to accelerate Gravitics' technology toward operational use, marking a significant milestone in advancing next-generation space infrastructure.



Eutelsat and EU to expand internet connectivity in Ukraine

European Institutions are in discussions with Eutelsat to deploy additional internet terminals in Ukraine. Eutelsat, which merged with OneWeb in 2023, has emphasised that its LEO services are already active in supporting Ukraine. The transition takes place amid increasing concerns regarding Starlink's reliability following U.S. President Donald Trump's announcement of pausing U.S. military assistance to Ukraine,

JAXA Prototype Terahertz system achieves high-bitrate transmission

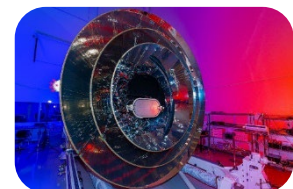
A research team from Waseda University and JAXA has developed a prototype terahertz wireless communication system, achieving a transmission speed of 4 Gbps over a distance of 4.4km using the 95 GHz band, which is one of the longest distances recorded for high-capacity communication in this frequency range. Future plans include increasing transmission speed to 20 Gbps over 20km, which could improve disaster response, remote connectivity, and space-based communications.

U.S. Space Force approves ULA's Vulcan rocket for National Security Launches

The U.S. Space Force has officially certified the United Launch Alliance (ULA) Vulcan rocket to carry national security payloads, marking a major milestone for the next-generation heavy-lift launcher. The certification follows two demonstration flights, including a successful anomaly investigation after a booster issue on the second launch. With 52 certification criteria met, Vulcan has now been approved to support the National Security Space Launch (NSSL) programme, expanding the U.S. military's launch capacity and resilience. ULA is set to fulfil its share of 26 missions under NSSL Phase 2, awarded alongside SpaceX.

NASA launches SPHEREx telescope to study universe origins

NASA has launched its SPHEREx telescope for a mission to explore the origins of the universe and to search the Milky Way galaxy for hidden water reservoirs. The mission is planned for a duration of two years and aims to collect data on over 450 million galaxies and 100 million stars in the Milky Way. It will produce a three-dimensional map of the cosmos in 102 colours and explore the history and evolution of galaxies. The objective of the mission is to deepen the understanding of the cosmic inflation phenomenon, which refers to the rapid and exponential expansion of the universe from a single point following the Big Bang.



Credit: NASA

Galileo HAS enhances FPSO positioning for Petrobras deepwater operations

Petrobras has adopted Galileo's High Accuracy Service (HAS) to enhance the positioning of its offshore Floating Production, Storage and Offloading (FPSO) vessels. Available since 2023, Galileo HAS provides sub-metric accuracy worldwide without the need for ground infrastructure, offering a reliable alternative to traditional Differential GNSS, which is limited in remote offshore areas. In partnership with Brazilian provider Mitang, Petrobras is deploying up to 40 HAS-enabled receivers to ensure precise, resilient positioning. The initiative highlights the global impact of European space technology in boosting efficiency and safety in the energy sector.



France plans VMAX Hypersonic Glider Test launch with domestic rocket

France will launch the next test of its VMAX hypersonic glider using a French-built sounding rocket, marking a transition away from previous reliance on U.S. launch systems. The first VMAX flight in 2023 was enabled by the U.S. Navy's Pathfinder rocket and demonstrated the glider's manoeuvrability and resilience under extreme conditions. The upcoming VMAX-2 test will trial a more advanced, near-operational design with new control systems and subsystems. ArianeGroup, the programme's prime contractor, is leading development alongside the French defence agency (DGA), with contributions from emerging French launch companies.

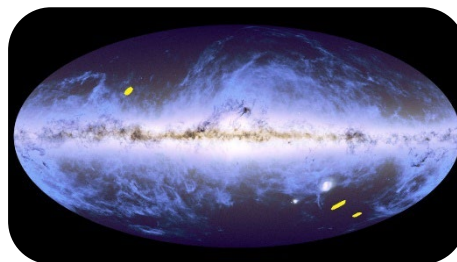
U.S. revokes satellite imagery access for Ukraine

Maxar Technologies has disabled satellite imagery access for Ukrainian users on the Global Enhanced GEOINT Delivery Program, which provides access to commercial satellite imagery collected by the U.S. This follows the Trump administration's decision to suspend intelligence sharing with Ukraine. Ukraine uses Maxar satellite imagery for tracking Russian troop movement and assessing infrastructure damage.

Mission Euclid delivers novel insights into the universe and dark matter

ESA's Euclid mission, launched in 2023, has started delivering unprecedented scientific data, offering deep insights into the structure and evolution of the universe.

With support from the German Space Agency, the mission uses high-resolution instruments to observe vast sky regions and has already detected over 26 million galaxies almost 11 billion light-years away. Euclid's data include gravitational lensing effects, which help to map the distribution of dark matter. Over its six-year mission, Euclid aims to observe more than ten billion galaxies to better understand the roles of dark matter and energy in shaping the cosmos.



Credit: ESA

ESA's Hera spacecraft complete flyby of Mars



Credit: ESA

ESA's Hera spacecraft completed a flyby of Mars on 12 March 2025, using the planet's gravity to adjust its trajectory toward the Didymos/Dimorphos asteroid system. During the flyby, Hera passed within 1,000km of Mars' moon Deimos, capturing rare, detailed images using its Asteroid Framing Camera (AFC) developed in Germany. The data aims to support the Mars Moon Exploration mission and the calibration of Hera's instruments for asteroid defence research. Hera also used the HyperScout-H spectrometer and JAXA's Thermal Infrared Imager (TIRI) to analyse surface composition and

physical properties.



ESA and Space Compass sign MoI for optical interoperability study

ESA and Space Compass Corporation, a joint NTT-SKY Perfect JSAT venture, have signed a Memorandum of Intent (MoI) to assess the feasibility of inter-satellite optical communication between Japan's LAIDEN project and ESA's HyDRON demonstration system. The agreement includes joint technical discussions, test planning, and potential in-orbit demonstrations to validate interoperability across GEO, MEO, LEO, and ground segments. The collaboration aligns with ESA's ScyLight programme and Space Compass' vision for a "Space Integrated Computing Network," advancing global, high-speed optical data relay capabilities.

GSSTI partners with Axiom Space

The Ghana Space Science and Technology Institute (GSSTI) has partnered with Axiom Space to accelerate national space capabilities and enhance its position in the global space economy. Aligning with Ghana's recent adoption of a national space policy, this partnership marks an important step in the nation's ambitions for space science, technology development, and exploration. The Memorandum of Understanding aims to boost innovation, talent development, and technological capacity. GSSTI will benefit from Axiom Space's expertise in human spaceflight and advanced technologies to strengthen its space programmes and long-term goals.

NASA reassigns astronauts to SpaceX Dragon as Starliner testing continues

NASA has reassigned three astronauts originally linked to Boeing's Starliner to SpaceX's Crew-11 mission, set for no earlier than July 2025. The shift reflects ongoing delays with Starliner, which remains under review due to unresolved propulsion anomalies from its crew flight test. As testing continues, NASA is considering options for Starliner's next flight, including a possible cargo-only mission, with a decision expected later in 2025.



Credit: NASA

Ecuador joins the 1975 Registration Convention

Ecuador has acceded to the 1975 Registration Convention, raising the number of States Parties to 77. This marks continued growth in adherence to space governance frameworks under the UN, particularly the alignment between COPUOS membership and Registration Convention participation, now with 69 States party to both.



In other news

Scientific study shows impact of climate change on near-Earth space environment. MIT aerospace engineers have discovered that greenhouse gas emissions are shrinking the upper atmosphere, reducing atmospheric drag that naturally clears space debris. This could extend the lifespan of space junk, increasing collision risks and reducing the capacity for satellites to operate safely in low Earth orbit by 50-66% by 2100.

Slovenia presents official gift to ESA. Marking its first participation at the ESA Council as a full member, Slovenia presented an official gift, a model of the space station by Herman Potočnik Noordung. The gift was handed over by Head of the Slovenian Space Office and the Slovenian Delegation to ESA, Tanja Permozer.

LuGRE achieves lunar radionavigation milestone. Lunar GNSS Receiver Experiment (LuGRE), a joint mission by ASI and NASA, has successfully captured GPS and Galileo signals from Earth, enabling the first-ever radio navigation positioning from the Moon. This marks a key advancement towards future lunar and deep space navigation systems.

German Space Agency Status Symposium "Research and Exploration" was held from 12 to 14 March 2025 at DLR. , bringing together 245 scientists from across Germany to exchange ideas on current research questions. Central topics included quantum science, medicine, biology, physics, and materials research, with a specific focus on space, microgravity research, and exploration.

China advances plans for the construction of a space-based solar power plant. China is planning to build an enormous solar power station in geostationary orbit, approximately 36,000 km above Earth. Spanning around one kilometre in width, it aims to revolutionise energy generation by harnessing solar energy without atmospheric interference and transmit power to Earth using advanced radio wave technology.

Copernicus data improves solar grid forecasting. Copernicus-powered applications help grid operators better forecast solar PV output, reducing uncertainties and improving grid balancing. France's ARMINES GIS-based platform, using Copernicus data, delivers high-resolution solar mapping, optimising reserve capacity and cutting costs for operators.

Crew-10 arrives at the International Space Station. Crew-10, consisting of Commander Anne McClain (NASA), and Mission Specialists Takuya Onishi (JAXA) and Kirill Peskov (Roscosmos), arrived at the ISS on March 16, 28 hours after launching.



INDUSTRY & BUSINESS

Thales Alenia Space selected to build Sky Perfect's JSAT-32



Credit: Thales Alenia Space

Thales Alenia Space and Sky Perfect JSAT Corporation have signed a contract to construct and develop a geostationary communications satellite "JSAT-32". The satellite will operate in the Ku and Ka frequency bands, providing coverage across Japan and surrounding seas. JSAT-32 is designed to replace existing Sky Perfect JSAT satellites providing communication services in Japan. Thales Alenia Space will serve as the prime contractor, responsible for designing, manufacturing, testing, and delivering the 3.7 tonne JSAT-32 satellite on its Spacebus 4000B2 platform. Scheduled for launch in 2027, the satellite is expected to operate for over 15 years.

Eutelsat partners with Orange to expand satellite connectivity

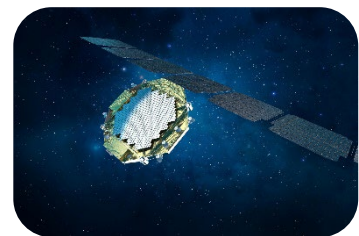
Eutelsat and Orange Middle East and Africa have signed a partnership aiming to leverage satellite broadband connectivity to bridge the digital divide in Africa and the Middle East, expanding internet access to underserved and remote areas. The collaboration will deliver up to 100 Mbps broadband to enhance connectivity by extending coverage to remote areas and ensuring secure, reliable service. It supports Orange's goal of promoting digital transformation and strengthening local digital ecosystems.

Thales Alenia Space signs contract with Telespazio for ESA LCNS programme

Thales Alenia Space has signed a contract with Telespazio for the design and development of the navigation system and satellite navigation infrastructure of ESA's Moonlight Lunar Communications and Navigation Services (LCNS) programme. Moonlight aims to develop a satellite constellation in lunar orbit to provide advanced communication and navigation services. Telespazio, the prime contractor, previously secured a €123 million contract with ESA for the programme's design phase. The project is expected to enable precise Moon landings, surface mobility, and reliable Earth-Moon communication, supporting future lunar exploration.

Thales Alenia Space, Ericsson, and Qualcomm Technologies achieve milestone

Thales Alenia Space, Ericsson, and Qualcomm have successfully tested 5G NR non-terrestrial network (NTN) technology using a simulated LEO satellite channel. The test confirms that a 5G device can maintain connectivity in areas beyond terrestrial network reach, such as oceans and remote forests, without extra satellite equipment. This milestone forms part of a collaboration launched in 2022 and brings 5G satellite integration closer to commercial use, supporting services like voice calls and video streaming.



Credit: Thales Alenia Space



Firefly Aerospace successfully completes first commercial Moon landing.

Firefly Aerospace's Blue Ghost lunar lander successfully landed in Mare Crisium on March 2, 2025, as part of NASA's Commercial Lunar Payload Services (CPLS) programme. The lander carries 10 NASA instruments and will support science and technology experiments for two weeks. During its 45-day journey, Blue Ghost travelled over 2.8 million miles, downlinked 27 GB of data, and supported several payload science operations, including radiation tolerant computing.

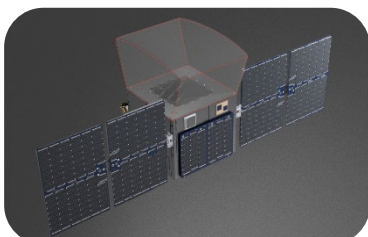
SES partners with Lynk Global to enhance D2D services

SES and Lynk Global have formed a strategic partnership to improve Lynk's direct-to-device (D2D) network. SES will provide Series B funding and integrated services, including MEO-Relay for secure real-time data routing and Network-as-a-Service for gateway access and tracking. SES will also facilitate Lynk's access to government, MNO, and automotive clients as its channel partner. The two companies will collaborate on network architecture and satellite manufacturing in the US and Europe.

Exotrail and MaiaSpace sign multi-launch service agreement

Exotrail and MaiaSpace have signed a multi-launch service agreement for spacevan missions, scheduled to begin in 2027. The agreement marks MaiaSpace's first commercial contract, highlighting its emergence as a key player in the global space transportation industry. The collaboration with MaiaSpace further builds Exotrail's spacevan manifest. The spacevan aims to expand access to space by offering flexible, in-orbit transportation services, contributing to a more efficient, interconnected space ecosystem. The partnership is set to promote greater synergies and innovation across the space sector.

Argotec unveils new modular satellite bus design



Credit: Argotec

Italian smallsat developer Argotec has introduced its new Hawk Plus design, a modular satellite bus engineered to accommodate various payloads using plug-and-play panels. Announced at the Satellite 2025 conference, the design separates the payload from the bus, enabling later-stage integration at different facilities, including for classified payloads. Production will take place at Argotec's Turin facility, with plans to expand manufacturing to Florida for hybrid production and assembly.

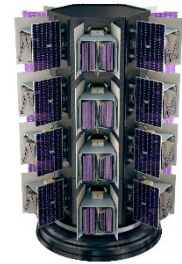
Orange and Telesat sign partnership for Telesat Lightspeed LEO constellation

Orange and Telesat have signed a strategic multi-year commercial partnership to provide satellite connectivity through the Telesat Lightspeed LEO constellation. Orange's teleport in Bercenay-en-Othe, France, will host a Telesat Lightspeed Landing Station, with ground connectivity to Telesat's Paris PoP via Orange's international private line. Orange will integrate Lightspeed's low-latency, secure connectivity into its global portfolio for businesses and telecommunications operators, enhancing resilience for mobile backhauling, crisis responses, and remote connectivity. The partnership will combine Telesat's satellite expertise with Orange's infrastructure to improve connectivity in underserved regions and improve global digital inclusion.



Exolaunch unveils next-generation satellite deployment system EXOtube

Exolaunch has introduced EXOtube, a next-generation satellite deployment system developed in partnership with Space Structures GmbH. Designed for maximum flexibility, EXOtube supports payloads up to 1,000kg, from CubeSats to microsats and large constellations. It offers customisable carbon fibre or metallic variants, is optimised for rideshare missions, and integrates seamlessly with Exolaunch's proven hardware. With built-in 4K cameras for deployment footage, EXOtube provides satellite operators with greater control, adaptability, and insight across their launch programmes.



Credit: Exolaunch

LiveEO and ACTUM Digital sign partnership to support compliance with EUDR

LiveEO and ACTUM Digital have formed a strategic partnership to support companies meeting the European Union Deforestation Regulation (EUDR) requirements. A key element of the collaboration will be LiveEO's end-to-end compliance platform, TradeAware, which uses AI-powered satellite analytics and legal review to deliver extensive deforestation risk assessments and automate key compliance tasks. ACTUM Digital will complement this with full-cycle client support, from gap analysis and product classification to the seamless integration of TradeAware into existing systems as a certified SAP partner. The partnership aims to transform regulatory compliance into competitive advantage with a future-proof solution to EUDR compliance.

Satellite Applications Catapult and Voyager Technologies sign MoU

UK-based space company Satellite Applications Catapult has signed a Memorandum of Understanding with Voyager Technologies to collaborate on In-Orbit Servicing, Assembly, and Manufacturing (ISAM), a market expected to exceed £10 billion by 2030. The partnership aims to explore in-orbit manufacturing, advanced robotics, AI integration, and the expansion of space station services. The agreement will leverage Catapult's UK expertise and Voyager's defence and innovation background to create commercial opportunities and strengthen the US-UK space industry relationship.

Exolaunch deploys eight satellites for OroraTech



Credit: Rocket Lab

Exolaunch has successfully deployed eight Spire-built satellites for OroraTech aboard Rocket Lab's Electron rocket from New Zealand. The satellites, equipped with infrared sensors, form OroraTech's first operational wildfire monitoring constellation, designed to detect fires in real time, including during critical afternoon and night periods. This marks Exolaunch's 35th mission and expands its heritage to 529 deployed satellites, reinforcing its partnerships with Spire and OroraTech and its role in advancing climate resilience from space.



Airbus purchases docking plates from Astroscale

Airbus has purchased 100 satellite removal docking plates from Astroscale to equip satellites for future post-mission removal, aiming to reduce space debris. This marks Astroscale's first large-scale order and a significant step towards routine in-orbit servicing. The docking plates were developed through Astroscale's ELSA-d and ADRAS-J missions, and can be captured using robotic or magnetic systems, including visual markers to support safe retrieval. Airbus will integrate the plates into an unspecified LEO constellation, with Astroscale planning a satellite removal demonstration under its ELSA-M mission in 2027.



Türksat signs agreement with Eutelsat to power IFC over Europe

Türksat and Eutelsat have signed a multi-million, multi-year agreement for Ka-band capacity on Eutelsat's KONNECT VHTS satellite. The agreement involves Türksat leveraging multiple beams over Europe to provide in-flight connectivity services to airlines. KONNECT VHTS, operational since October 2023, offers Ka-band capacity of 500Gbps and features an advanced onboard digital processor to support flexible and efficient service delivery across broadband and mobility services.

AIA outlines top U.S. space policy priorities for 2025

The Aerospace Industries Association (AIA) has released its 2025 space policy priorities, calling for a sustained U.S. presence on the Moon and the development of offensive space capabilities. The report outlines nearly 30 recommendations for agencies including the DoD, NASA, FAA, and others. Key proposals include streamlining launch licensing, boosting FAA and Office of Space Commerce funding, clarifying tech ownership in public-private partnerships, ensuring a smooth transition from the ISS to commercial stations, and enhancing interagency coordination through a dedicated office in the Executive Branch.

Rocket Lab reveals Flatellite satellite platform

Credit: Astroscale



Credit: Rocket Lab

Rocket Lab has introduced its new hardware, the Flatellite, a "scalable, long-life, high-power, stackable satellite", designed for secure, low-latency connectivity and remote sensing. Its flat, stackable shape allows for more efficient deployment per launch and seamless integration with Rocket Lab's upcoming Neutron rocket. The Flatellite integrates Rocket Lab's in-house components, including propulsion, avionics, and software with enhanced cybersecurity. Rocket Lab's focus on vertical integration aims to enable high-volume production for large constellations.



Momentum and Solstar sign agreement for LEO WiFi hotspot

Momentum and Solstar have signed an agreement to demonstrate the first LEO WiFi hotspot in 2026. Solstar's Deke Space Communicator will fly aboard Momentum's Vigoride orbital transfer vehicle, enabling continuous narrowband connectivity for onboard payloads via Iridium's satellite network. Unlike traditional satellite operations reliant on intermittent ground station contact, Deke allows for 24/7 communications and real-time control. The technology has the potential to reduce satellite weight by minimising wiring and could enhance operations like rendezvous and proximity manoeuvres. Both companies consider the demonstration as a step towards long-term collaboration.

Space42 and Viasat sign MoU for development of 5G NTN

Space42 and Viasat have signed a Memorandum of Understanding (MoU) to explore a joint 5G non-terrestrial network (NTN) initiative. The partnership aims to develop a multi-orbit, standards-based infrastructure supporting direct-to-device communications, IoT, and mobile satellite services. The first phase of the partnership will focus on technical commercial studies aligned with 3GPP and MSSA guidelines.

SuperMap and Neo Space Group sign cooperation framework agreement

SuperMap has signed a cooperation framework agreement with Neo Space Group and established an office in Saudi Arabia to **advance geospatial technology in the region**. The agreement aims to enhance collaboration in geographic information, supporting Saudi Arabia's geospatial technology sector and advancing the Kingdom's "Vision 2030" goals. SuperMap recently opened a local office in Saudi Arabia to strengthen its presence and support regional initiatives, highlighting its commitment to long-term partnerships and innovation in the Middle East.





In other news

NordSpace launches SHARP programme to enhance Canadian Defence. Ontario-based NordSpace has unveiled the SHARP programme to advance Canada's hypersonic capabilities, featuring three key technologies: the SHARP Arrow uncrewed aircraft, the SHARP Sabre hypersonic rocket, and the M2S-HyRock multi-fuel engine. SHARP aims to improve national security, Arctic monitoring, and rapid launch readiness. The company is also developing Spaceport Canada, which is planned to support test flights and attract international launch activity.

i2CAT and Open Cosmos to launch LEO research lab in NTN. i2CAT and Open Cosmos have announced plans to launch 6GStarLab, Europe's first LEO laboratory dedicated to non-terrestrial network (NTN) research and development. Funded through Spain's UNICO I+D 6G programme and NextGenerationEU, the project aims to validate key 6G technologies in orbit, involving multi-frequency communications, satellite virtualisation, and optical ground links. The satellite, built by Open Cosmos, is set to launch in October 2025 with operations planned to begin in early 2026. 6GStarLab is designed as an open, remote-access testbed to support European NTN standardisation and promote collaboration across industry, academia, and government.

Arkisys and Sidus Space launch in-orbit connectable interface on LizzieSat-3. Arkisys has collaborated with Sidus Space to launch the intelligent Space Systems Interface post-launch connectable interface to LEO aboard LizzieSat-3 via SpaceX's Transporter-13 mission. Developed by IBOSS, the iSSI enables post-launch connection for inspection, servicing, and upgrades, marking a key step toward modular, long-term satellite operations.

Starlink signs agreement with leading Indian telecom providers. Starlink has signed partnership agreements with India's two leading telecommunications providers, Reliance Jio and Bharti Airtel. This represents a significant step toward entering India's broadband market, pending government approval.



INVESTMENT & FINANCE

Sateliot closes €70 million Series B for IoT constellation



Credit: Sateliot

The Spanish startup has completed its €70 million Series B round led by Hyperion Fund. The funding notably comprises a €10 million investment from Hyperion, a €13.8 million investment from the Spanish government through SETT, and a €30 million debt injection from the European Investment Bank. Sateliot aims to build a 100-satellite LEO constellation providing 5G-IoT services to industries like agriculture, defence, and energy. Six satellites have so far been launched by the company, which reports €270 million in contracts secured with more than 400 clients. The investment will be used to accelerate the deployment of additional satellites.

Spanish government invests €67 million in Multiverse Computing

Spain has become a shareholder of Multiverse Computing by committing €67 million into the company. The funding was carried out through the Spanish Society for Technological Transformation (SETT), a governmental agency tasked with implementing public investments in the tech sector. Multiverse Computing develops quantum-inspired software to compress AI models up to 10% of their original size, allowing cost and power savings. The company is notably active in the space sector, where it seeks to automate satellite docking, but also enable intensive simulations. While he has not specified how the funding would be used, Multiverse's co-founder and CEO Enrique Lizaso Olmos stated that the company was working towards more efficient models.

Rocket Lab announces intention to acquire Mynaric

U.S. launch company Rocket Lab has stated its intention to acquire a controlling equity position in Germany-based Mynaric, pending completion of Mynaric's restructuring process and governmental approvals. The expected \$75 million transaction, payable in cash or shares at Rocket Lab's discretion, includes potential additional compensation of up to \$75 million based on future revenue performance. Mynaric, specialising in satellite-to-satellite optical communication terminals, shares key contracts with Rocket Lab, including a \$515 million Space Development Agency deal for 18 satellites. The strategic acquisition would enhance Rocket Lab's vertical integration, enable scalable laser communication subsystem production to meet a growing demand, and provide a strategic entry point into the European market.

Eric Schmidt takes controlling stake in Relativity Space

Former Google CEO Eric Schmidt, with an estimated net worth of \$30 billion, has taken a controlling interest in Relativity after a **\$1 billion investment in the company.** Relativity suffered financial difficulties after retiring its light Terran 1 vehicle (which flew once, in 2023, and failed nine minutes in) to pivot towards heavy-lift Terran R. **A focus on 3D printed materials was also abandoned, with traditional parts now being integrated into the vehicle.** Eric Schmidt's initial priorities as CEO will be to strengthen Relativity's operational framework, as well as refine product development and manufacturing processes to meet the initial 2026 flight target for Terran R.



Credit: Relativity Space



Chinese rocket makers secure funding for initial launch and landing



Credit: Deep Blue Aerospace

Deep Blue Aerospace raises close to €65 million for Nebula-1

Deep Blue Aerospace has secured about **CH¥500 million (€64.5 million) in a funding round** led by state-owned Taishan Industrial Development Investment Group's subsidiary, the Taian Yuanwang New Energy Industry Investment Fund. Deep Blue is currently manufacturing its Nebula-1 launcher, designed to carry up to two tons in LEO and with a reusable, landing-capable first stage. A first test was conducted in September 2024 and resulted in the explosion of the booster. Deep Blue, whose next test is scheduled for mid-2025, will use the investment to further iterate on research and development and enhance commercialisation efforts.

iSpace secures "several hundred million yuan" for Hyperbola-3

iSpace (Beijing Interstellar Glory Space Technology) has raised "**several hundred million yuan**" (**100 million yuan = €12.9 million**) in a **Series D round** led by provincial fund Sichuan Tianfu Xinyun Digital Economy Development Fund. iSpace is developing its Hyperbola-3 launcher, able to carry up to eight tons in LEO in its reusable version, and 13 in expendable. The company is targeting a first launch in December this year, including a first stage "sea recovery", and is planning to open a factory in 2026 with the capacity to manufacture 100 engines per year. The funding will be directed towards the completion of this effort as well as R&D.

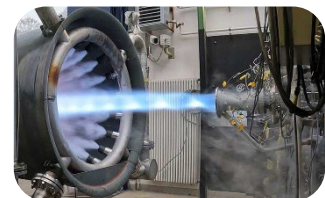
Karman Holdings closes \$506 million IPO

U.S.-based Karman Holdings, conducting business under the name **Karman Space and Defense**, **has raised \$506 million in its Initial Public Offering**. The company was formed in 2021 with backing from private equity firm Trive Capital, which partnered with Aerospace Engineering Corp. and AMRO Fabricating Corporation, both later acquired by Karman that same year.

Karman surpassed its initial price target, selling 23 million shares at \$22 each, beyond the originally marketed range of \$18 to \$20. Karman, which specialises in the design, testing and manufacturing of space subsystems, now approaches a market value of \$3 billion. Private equity firm Trive Capital and affiliates, which back the company, will retain their status as major shareholders following the IPO, whose funding will enable Karman to pursue acquisitions and the financing of general business purposes.

Pangea Aerospace secures €23 million for propulsion systems

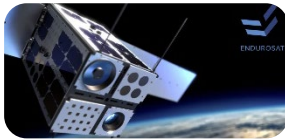
The Spanish startup has raised **€23 million in a Series A round** led by Hyperion Fund. Pangea Aerospace initially attempted to build a light launcher, Meso, before pivoting in early 2023 towards the development of sustainable propulsion systems for both rockets and in-space mobility. Currently engaged in eight contracts with both private and institutional actors, the company is notably working with ESA in defining the specifications needed for future reusable European launchers, as well as the validation of key technologies for the continent's next large launchers. Pangea will direct the funding towards the expansion of its customer base.



Credit: Pangea Aerospace



EnduroSat raises €20 million for space data access services



Credit: EnduroSat

The Bulgarian company has secured **€20 million in an investment round** led by Luxembourg-based PE firm CEECAT Capital. EnduroSat develops complete satellites and sub-systems and seeks to facilitate access to space-based data through an end-to-end service offer. Selected by ESA and the EU for Copernicus Contributing Missions, **it launched in January 2025 Balkan-1**, a satellite designed to capture high resolution multispectral imagery and broaden the coverage of the Sentinel constellation. The investment will go towards increasing EnduroSat satellites' size to penetrate new market segments.

ATLANT 3D raises \$15 million for space manufacturing

ATLANT 3D has secured \$15 million in a Series A+ funding round led by West Hill Capital. The Danish startup, which recently opened an office in London, has developed a manufacturing technology branded direct atomic layer processing (DALP), which allows an atom-by-atom construction process. The company announced in early March the result of a 16-month-long collaboration with ESA, resulting in the validation of NANOFABRICATOR, an adaptation of their DALP system tailored for zero gravity manufacturing, potentially enabling autonomous construction during deep space missions. The investment will be directed towards improving the technology and tying partnerships with relevant agencies and partners.

Lumen Orbit rebrands, secures \$10 million for space-based data centres

Lumen Orbit, which raised \$11 million in December 2024, rebranded as Starcloud and secured \$10 million in a seed round. Starcloud aims to build megawatt-scale data centres in space, powered by solar panels, and capable of beaming compute results back to Earth via laser transmission. A first demonstrator, equipped with Nvidia chips through a partnership, is set to launch this summer. The funding will carry the company through its next two launches.

Skyfora raises €4 million for weather intelligence

The Finnish startup has secured **€4 million in a funding round** co-led by Ugly Duckling Ventures and LUMO Labs. Skyfora develops AI-derived weather intelligence insights by repurposing mobile telecom towers into weather sensors using GNSS signals such as Galileo's. The company went through ESA's Business Incubation Centre and received support from the Agency in developing its StreamSonde light recording weather parameters device. The investment will be used to scale up the deployment of its GNSS meteorology solution.

Letara secures nearly €3.9 million for propulsion systems

The Japanese startup has raised **¥650 million (€3.9 million) in a second seed round**, following ¥480 million secured in December. Letara is a spinoff from Hokkaido University's Laboratory of Space Systems and designs plastic-based hybrid propulsion systems for spacecraft. The technology, the company says, allows high thrust while mitigating explosion risks inherent to plastic-based systems. Letara will allocate the investment to accelerate the preparations for its first orbital demonstration.



Credit: Letara



In other news

Ester raises AU\$5 million in seed: the round was co-led by Paspalis Capital and Hejaz. Ester develops EO hyperspectral satellites specifically designed for the detection of critical minerals but also markets its services to the defence and agricultural sectors. The funding will enable the planned launch of eight satellites across 2025 and 2026, adding to the three already in orbit, and expand the team.

Sweden's Remos Space raises €1 million in seed: Remos Space seeks to provide automated and scalable software solutions for ground stations to ease the processing of satellite signals. The company will direct the funding towards global expansion, with a specific emphasis on the African market.

India-based Astrogate Labs secures \$1.3 million: the round was led by Piper Serica Angel Fund. The startup manufactures laser communication terminals enabling improved data downlink and will use the investment to scale operations and tie partnerships with space and defence organisations.

Ocean Ledger raises \$900k for geospatial analytics: the round was co-led by Impact Ventures and Silverstrand Capital. The U.K. startup offers space-based analytics to public and private entities, with a specific focus on coastline global environment risk assessment. The investment will assist in scaling up the company's product.

Previsico secures an unspecified funding amount for flood alerts: the round was led by Burnt Island Ventures. Previsico leverages IoT and weather data to develop flood models destined for businesses, such as insurance, as well as public agencies. The funding will support Previsico's growth and expansion in the U.S.

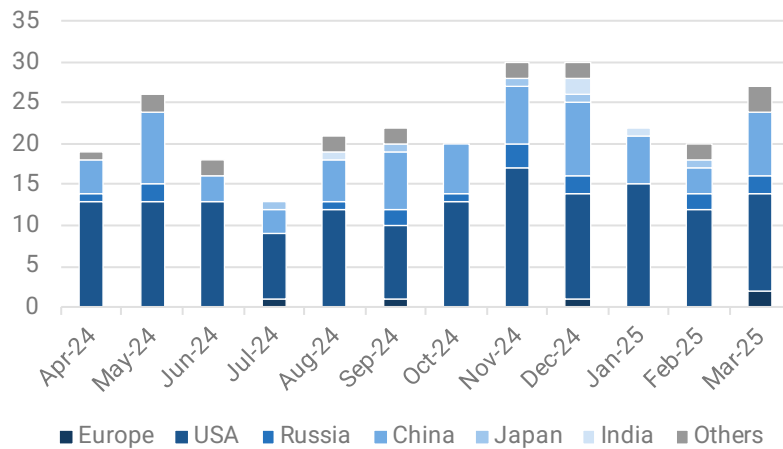


LAUNCHES & SATELLITES

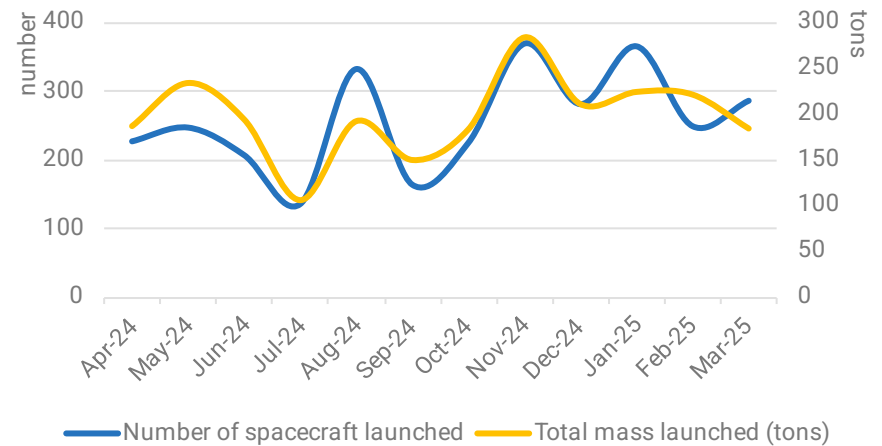
Global space activity statistics

March 2025	Europe	USA	China	Russia	Others	Total
Number of launches	2	12	8	2	3	27
Number of spacecraft launched	2	229	38	4	14	287
Mass launched (in kg)	3655	156 960	19 910	2320	330	183 176

Launch activity over the year



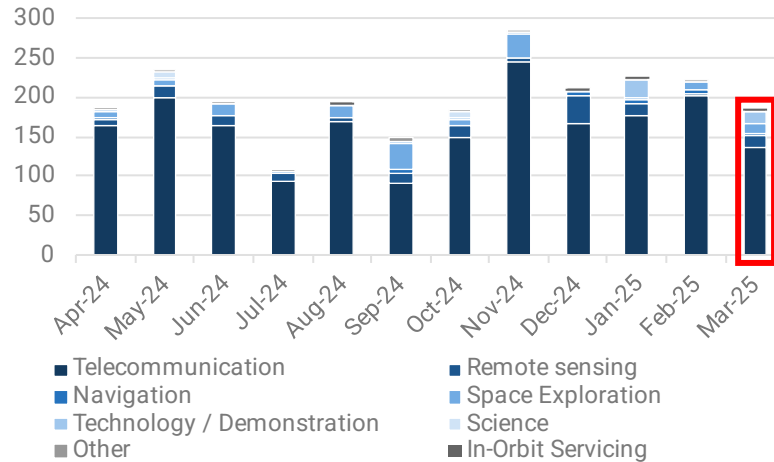
Evolution of the number of launches per launch country



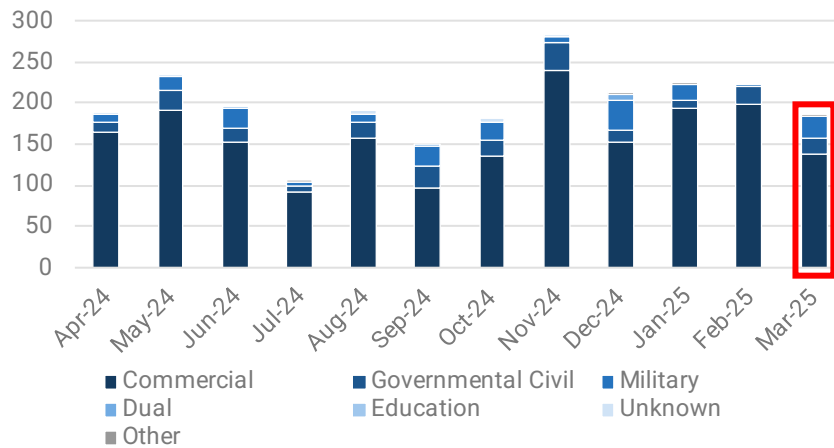
Evolution of launch activity over the year 2024-2025



Satellite missions and markets



Evolution of the total mass launched (tons) per mission (Apr. 2024-Mar. 2025)



Evolution of the total mass launched (tons), per market (Apr. 2024-Mar. 2025)

March 2025	Telecom	Remote sensing	Nav.	IOS	Exploration	Science	Tech / Dem.	Other
Europe	150	4125		100		67	80	1
USA	125 640	8866			12 055	686	8018	90
China	10 400	1410					8000	100
Russia			1645					
Japan		100						
India							5	
Others		940					15	9

Total mass (kg) launched by mission and customer country

March 2025	Commercial	Governmental Civil	Military	Education	Unknown	Other
Europe	800	67	3655			1
USA	130 524	12 781	12 050			
China	6610	5200	8000		100	
Russia			2320			
Japan	100					
India	5					
Others	700	240	14	10		

Total mass (kg) launched by market and customer country



LAUNCH HIGHLIGHTS

Spectrum launched from Andøya

Isar Aerospace's inaugural launch of the Spectrum rocket on March 30 marked the first orbital launch attempt by a private company based in continental Europe. The company described the flight as a valuable first test, even though the vehicle lost attitude control shortly after liftoff and fell back to Earth. The launch took place from Norway's Andøya Spaceport. Spectrum is a two-stage small launch vehicle intended to deliver up to 1,000 kilograms to low Earth orbit and 700 kilograms to sun-synchronous orbit. Isar Aerospace, headquartered in Munich, Germany, has raised over €400 million in funding, including more than €65 million through an extension of its Series C round in mid-2024. Isar is one of several startups in Europe working on small satellite launchers. Another German competitor, Rocket Factory Augsburg, is preparing for the debut of its RFA ONE rocket. However, that effort suffered a setback in August 2024 when the rocket's first stage was destroyed during a static-fire test at the SaxaVord Spaceport in the Shetland Islands.



Credit: Isar Aerospace

Second Ariane 6 flight launches French Spysat



Credit: Arianespace

On March 6, an Ariane 6 rocket carried out its second mission, successfully launching a military reconnaissance satellite on behalf of France from Europe's spaceport in Kourou. The payload was CSO-3, the final satellite in the Composante Spatiale Optique (CSO) series. This constellation is designed to provide high-resolution optical imagery for defence and intelligence purposes. The satellite platform was developed by Airbus Defence and Space, while the optical instrument was supplied by Thales Alenia Space. This mission marked the second flight for Ariane 6, following its debut launch in July 2024, which was mostly successful. Five Ariane 6 launches are planned for 2025, with launch service provider Arianespace aiming to eventually reach an annual flight rate of 9 to 10 launches, which is considered essential to meet commercial demand. This increased cadence is especially important for fulfilling contracts like that of Amazon's Project Kuiper, which purchased 18 Ariane 6 launches in 2022 to deploy part of its broadband satellite constellation.

Starship suffered its second consecutive test flight failure

SpaceX's Starship experienced its second unsuccessful test flight on March 6, after the vehicle lost stability in space and ultimately disintegrated during re-entry over the Caribbean Sea. The vehicle successfully lifted off, completed stage separation, and the Super Heavy booster executed a return manoeuvre, achieving a controlled landing back at the launch tower, marking the third such recovery in four attempts since October 2024. Approximately eight minutes into flight, the Starship upper stage began experiencing anomalies as the vehicle began to tumble uncontrollably and was ultimately lost. This incident closely mirrors the outcome of Flight 7, conducted on January 16, when communications with the vehicle were lost just over eight minutes after launch.

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