



ESPI

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Policy Institute

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Space Sector Watch



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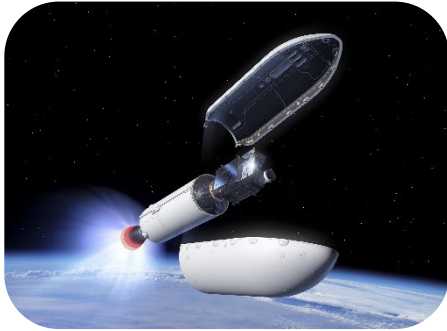
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POLICY & PROGRAMMES

MTG-S1 satellite is launched for weather forecasting and air quality monitoring



Credit: ESA

On 1 July 2025, MTG-S1, the first atmospheric sounding satellite in Europe's Meteosat Third Generation (MTG) programme, was successfully launched with the first instrument of the Copernicus mission Sentinel-4 on board, from Cape Canaveral. Built by OHB, with its main payload developed by Thales Alenia Space, **MTG-S1 features Europe's first hyperspectral infrared sounder in geostationary orbit.** It is designed to enable 3D mapping of Earth's atmosphere, significantly improving numerical weather prediction. The satellite also carries the Copernicus

Sentinel-4 instrument, built by Airbus, for monitoring air quality and greenhouse gases. MTG-S1 joins the MTG-I1 imaging satellite, which was launched in 2022 as part of a third generation of the Meteosat programme to provide more accurate and frequent weather data through 2040.

Germany awards Planet with €240 million agreement

The German government has awarded Planet Labs Germany with a multi-year **€240 million agreement** for the provision of capacity and direct downlink services on Pelican satellites over certain European regions. The agreement includes access to PlanetScope and SkySat data, as well as AI-driven solutions to increase situational and maritime domain awareness. Planet's dedicated Pelican satellite capacity will deliver high-resolution imagery and intelligence. The contract reflects a growing demand for sovereign geospatial intelligence and builds on Planet's recent agreement with NATO.

Norway proposes New Space Act

The Norwegian government has proposed a new **Space Activities Act (Prop. 155 L, 2024-2025)** aimed at modernising the legal framework for space operations in Norway. The bill seeks to promote business development, innovation, and the peaceful use of outer space, while embedding environmental and national security considerations. It includes regulations on licensing, registration of space objects, liability and insurance, oversight mechanisms, and administrative measures. The Act builds on the recommendations of the 2019 "Rett i Bane" report and introduces safety and sustainability requirements for space operators. It also designates the Civil Aviation Authority (Luftfartsilsynet) as the national space regulator and allows for the development of more detailed rules through secondary legislation.

ESA preselects five companies for European Launcher Challenge

ESA has preselected Isar Aerospace, Maiaspace, Orbital Express Launch, PLD Space, and Rocket Factory Augsburg to advance in the **European Launcher Challenge**. The initiative aims to enhance Europe's launch capabilities through a two-stage tender offering up to €169 million per company for services between 2026-2030 and launch capacity upgrades. ESA will now refine the programme ahead of funding decisions at the CM25 Ministerial Council in November 2025.



Germany and Norway enhance space cooperation under strategic partnership

Germany and Norway have committed to expanding their strategic partnership with a new focus on space cooperation, alongside increased collaboration on maritime and land security. In a joint declaration, the two nations recognised space as a strategic domain essential to national defence and European autonomy. The agreement underscores their shared goal of securing autonomous access to space and improving situational awareness amid rising hybrid threats in the North Atlantic. Germany and Norway have already established cooperation through the private sector, with the launch agreement between Germany's Isar Aerospace and Norway's Andøya Spaceport, despite the first liftoff attempt proving unsuccessful.

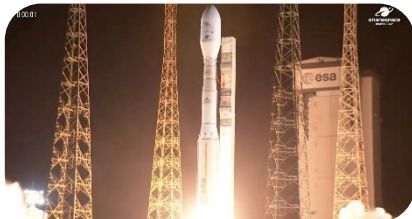
GovSat orders defence communications satellite from Thales Alenia Space

GovSat, a joint venture between the Luxembourg government and SES, has signed a contract with Thales Alenia Space for the development of GovSat-2, a secure geostationary defence communications satellite. Built on the Spacebus 4000B2 platform, GovSat-2 will operate in X, Ka, and UHF bands, providing secure, jam-resistant telecommunications for Luxembourg's defence and its partners. Thales Alenia Space will act as a prime contractor, responsible for design, manufacturing, and delivery. The satellite is expected to operate for over 15 years. Co-funded by SES and the Luxembourg government, the project is pending parliamentary approval of national defence funding,



Credit: Thales Alenia Space

Vega C successfully launches CO₂-mapping and EO satellites



Credit: Arianespace

On 25 July 2025 at 10:03pm EDT, a Vega C rocket operated by Arianespace was launched from Europe's Spaceport in Kourou, French Guiana, carrying five satellites into orbit. The mission, designated VV27, successfully deployed all payloads. The primary payload, MicroCarb, led by CNES, is designed to map global carbon dioxide sources and sinks with high precision (1 ppm) from a sun-synchronous orbit at 650km altitude. The other four satellites from CO₃D, a CNES-Airbus constellation will provide high-resolution 3D maps of Earth's land surfaces, operating from 502km altitude.

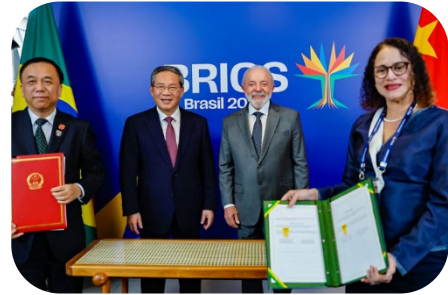
BRICS leaders agree to establish a BRICS Space Council

At the 2025 BRICS Summit in Rio de Janeiro, member states agreed in principle to establish a BRICS Space Council, aimed at enhancing collaboration in space activities. The initiative, which was first proposed by Roscosmos head Dmitry Bakanov, is planned to serve as an advisory body for the coordination of peaceful space exploration, technology development, and joint programmes among the ten member countries. The Council will focus on issues such as space traffic management, satellite navigation, space debris, and resource development, while also promoting equal access to space capabilities. Leaders emphasised their commitment to preventing an arms race in space and proposed drafting a related treaty.



Brazil and China announce joint development of satellite

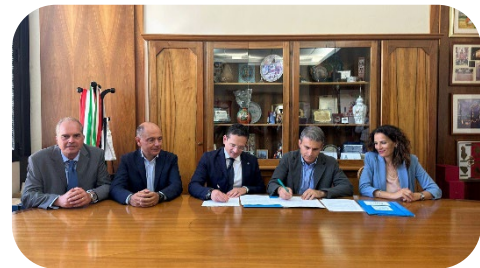
On 5 July 2025 at the BRICS Summit in Rio de Janeiro, Brazil and China announced plans for the joint development of the **CBERS-5 satellite**, representing the first geostationary satellite under the China-Brazil Earth Resources Satellite (CBERS) programme. The satellite aims to enhance weather and environmental monitoring over Brazil supporting sectors like energy, agriculture, and disaster response. This includes a formal technology and knowledge transfer agreement. CBERS-5 data will be distributed free of charge to Latin American and Caribbean countries, reinforcing the programme's commitment to regional cooperation. China will benefit from improved access to environmental data from the Western Hemisphere, enhancing its climate modelling and research.



Credit: Ricardo Stuckert

ASI and Selargius sign agreement for new Sardinia headquarters

The Italian Space Agency (ASI) has signed an agreement with the Municipality of Selargius to establish a new **ASI operational headquarters in Sardinia**, adjacent to the Sardinia Radio Telescope in San Basilio. The new Sardinia Deep Space Antenna (SDSA) Research Centre will support activities related to deep space navigation and communication. The Selargius site will become ASI's third operational base, alongside Matera and Malindi, and will serve as a hub for research, equipment development,

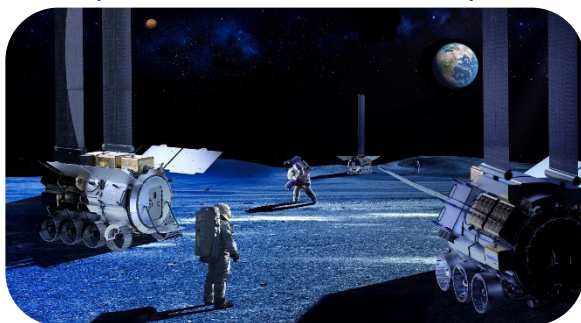


Credit: ASI

testing, training, and scientific outreach. It will also enhance collaboration with INAF, NASA, ESA, and local universities. The development forms part of a broader strategy to enhance Sardinia's role in international space science and support its Einstein Telescope candidacy.

ASI and Thales Alenia Space sign contract for lunar habitat module

The Italian Space Agency (ASI) has signed a contract with Thales Alenia Space for the **development of the MPH (Multi-Purpose Habitation) module**, a key element of NASA's Artemis programme. The contract covers the preliminary design and enabling technologies for a lunar surface habitat, with the launch scheduled for 2033 from the Kennedy Space Center. MPH is intended to support long-duration human presence on the Moon, providing astronaut accommodation, enabling surface operations and scientific research, and enabling limited mobility. It is designed for a 10-year lifespan and will operate in coordination with other Artemis infrastructure.



Credit: Thales Alenia Space

Thales Alenia Space will lead the two-year design phase, alongside Altec and other Italian partners, with a focus on solutions for extreme lunar conditions, such as radiation, dust, temperature changes, and reduced gravity.



SITAEL opens electric propulsion Smart Factory 4.0 in Pisa

On 22 July 2025, Italy's SITAEL inaugurated its new Smart Factory 4.0 in Pisa, dedicated to the production of electric propulsion systems for next-generation satellites. The facility, developed under the Space Factory 4.0 public-private partnership with the Italian Space Agency and funded through the PNRR, features the largest space simulator in Europe, an ISO-8 clean room, thermo-vacuum chambers, and testing infrastructure for Hall-effect thrusters. The Pisa site complements a larger hub, which was opened in Mola di Bari earlier this year.

Lithuania prioritises space sector as strategic asset amid growing innovation

Lithuanian officials have increasingly highlighted space technology as a strategic priority, with 30% of the country's space projects receiving EU funding, which is well above the EU average. Industry leaders, however, are calling for increased domestic investment to match the pace of innovation. Among the companies driving the sector's growth is Astrolight, which recently raised €2.8 million to develop laser-based satellite communications. Its technology is being explored for defence applications, including by the Lithuanian Navy and through NATO's DIANA programme. Other commercial entities such as Blackswan Space and NanoAvionics are developing autonomous satellite navigation and satellite manufacturing capabilities.

Trump nominates Sean Duffy as interim NASA administrator amid budget cuts

U.S. President Donald Trump has named Transportation Secretary Sean Duffy as NASA's acting Administrator, following the withdrawal of Jared Isaacman's nomination. The decision is reportedly tied to Isaacman's connections to Elon Musk and political donations to Democrats. Duffy will temporarily lead NASA while retaining his transportation portfolio. **The appointment comes as NASA faces unprecedented budget and workforce reductions under the Trump Administration's FY2026 proposal**, which would cut the agency's budget by 24.3%, from \$24.8 billion to \$18.8 billion.



Credit: The Washington Post

The science and space technology budgets would each be cut in half, and aeronautics by one-third, while human spaceflight would receive a \$1 billion increase to support future missions to Mars. NASA leadership has warned that the proposed cuts would require reducing the agency's workforce by over 5,500 positions by the start of the next fiscal year. Analysts note the scale of the reductions surpasses even the post-Shuttle and Constellation transitions, with some comparing it to the end of the Apollo era. If enacted, the FY2026 request would reportedly represent NASA's smallest budget since 1961, before the agency sent its first astronaut into space. However, both the **House and Senate appropriations committees have rejected the proposed cuts** in their respective draft bills, instead maintaining near-level funding and opposing plans to terminate key programmes such as SLS, Orion, and the Gateway lunar station.



Trump Administration considers easing rocket launch regulations

A draft executive order under review by the Trump administration proposes significant deregulation of commercial rocket launches, including cuts to environmental reviews and public safety rules. The order would direct the Department of Transportation to accelerate or eliminate review processes for launch licenses and potentially restrict the ability of states to challenge spaceport construction along their coasts. The proposal aligns with long-standing industry demands from companies like SpaceX, Blue Origin, and Rocket Lab, which argue that current regulations delay launches and constrain U.S. competitiveness. If enacted, the order would increase the control of the White House over commercial space oversight and weaken FAA authority. Critics voice concerns regarding environmental and public safety, citing the disruption to air traffic by SpaceX's recent Starship launches.

The EU and Japan plan development of communications satellite network

The European Union and Japan are preparing to launch a joint communications satellite constellation to reduce dependence on U.S.-based systems, such as SpaceX's Starlink. The initiative, still in early coordination phases, would involve jointly operating small satellites, with a focus on digital transformation, space security, and industry development. The agreement outlines plans for public-private partnerships, data sharing on climate and disaster response, and collaboration on space debris mitigation. It also includes a competitiveness alliance to support the peace, defence, environmental, and digital sectors, as well as deeper economic and security cooperation.

UK invests €163 million in Eutelsat



Credit: Bloomberg

The UK government has announced plans to invest €163.3 million in Eutelsat Communications. The funding brings Eutelsat's total capital raised to €1.5 billion as the company aims to expand its low-Earth orbit constellation, OneWeb. Eutelsat is considered strategically important for European autonomy in satellite communications, particularly in light of geopolitical tensions and growing concerns over reliance on US-based providers like Starlink. This comes after **France increased their stake in Eutelsat in June.**

The financial backing directly supports a **newly signed agreement between Eutelsat, FCDO Services, and NSSGlobal, under which OneWeb LEO services will deliver secure, low-latency connectivity for UK government operations worldwide.** The services will support diplomatic, defence, disaster response, and policing missions, including in remote or crisis-prone regions such as British Overseas Territories in the Caribbean.



UK announces new space projects and funding at Manchester conference

At the UK Space Conference on 16 July 2025, the UK Space Agency announced £4.5 million for advanced satellite communications projects, including LEO-based 5G/6G systems, in-orbit refuelling, and lunar connectivity. An additional £1.6 million will be dedicated to supporting innovation across regional space clusters. New figures show that space and satellite services now support £454 billion in wider industrial activity, representing 18% of the UK's GDP. The Space Agency also highlighted the UK's role in ESA's Moonlight programme for lunar communications and the upcoming MicroCarb climate mission with France. The event also highlighted the UK's role in space sustainability, following the **launch of a £75.6 million tender for the nation's first Active Debris Removal (ADR) mission**. The project aims to protect critical satellite infrastructure and reinforce the UK's position in the In-orbit Servicing, Assembly and Manufacturing (ISAM) market.

Denmark provides satellite communications support to Ukraine

Denmark is supplying Ukraine with satellite communication terminals through the European Defence Agency (EDA), aiming to expand Ukraine's access to European-produced satellite services. While specific providers have not been named, the Danish Ministry of Defence has confirmed the equipment is sourced from European suppliers. Danish Defence Minister Troels Lund Poulsen highlighted the growing defence relevance of space-based solutions, noting the donation supports Ukraine and contributes to strengthening European autonomy in the sector. Throughout the war, Ukraine has relied on SpaceX's Starlink services, prompting European leaders to emphasise the importance of investing in European alternatives.

EUMETSAT authorises initial work on EPS-Sterna polar satellite constellation

The EUMETSAT Council has approved limited initial activities for the EPS-Sterna programme, a planned constellation of polar-orbiting microsatellites designed to improve global weather forecasting through frequent microwave observations of atmospheric temperature and humidity. EPS-Sterna builds on ESA's Arctic Weather Satellite and aims to enhance nowcasting in high latitudes, fill data gaps in polar regions, and improve early warning systems across Europe. The constellation is expected to reduce forecast errors by up to 9% in the Arctic and deliver a benefit-cost ratio of up to 51:1, potentially generating over €30 billion in economic value over 14 years. An initial six satellites are scheduled for launch in 2029, with 20 planned in total to provide near-global coverage every five hours through 2042. Formal approval of the full programme remains pending. **EUMETSAT has also formalised a partnership with Mercator Ocean**, with the agreement aiming to enhance data sharing and cooperation on ocean forecasting, climate monitoring, and digital ocean initiatives.



Credit: ESA



South Korea becomes first Asian associate of Horizon Europe

As of July 17, 2025, South Korea has officially become an associate member of Horizon Europe, the EU's €39.5 billion research and innovation programme. This enables Korean researchers and organisations to participate in Pillar II, the €52.4 billion section focused on global industrial and societal challenges, on equal terms with EU member states. While access to the European Research Council is excluded, Korean entities can now lead consortia, access funding, and collaborate with European institutions.



Credit: European Union

Korea outlines space exploration roadmap with plans to establish lunar base

South Korea's space agency, the Korea AeroSpace Administration (KASA), has released a long-term space exploration roadmap targeting the establishment of a lunar base by 2045. The roadmap categorises exploration areas into four main domains: Earth orbit, moon, heliosphere and deep space. It also outlines five core missions, including LEO and microgravity, lunar exploration, and solar and space science. In the lunar segment, plans include developing domestic landing and mobility technologies, exploring lunar resource use, and constructing infrastructure to support future activities. A next-generation lunar lander for logistics is planned by 2040. The roadmap also proposes deploying a solar observation satellite to the Lagrange point L4 by 2035, with the aim of enhancing space weather monitoring and safety.

KARI signs technology transfer agreement with Hanwha Aerospace

The Korea Aerospace Research Institute (KARI) has signed a technology transfer agreement with Hanwha Aerospace for the Korea Space Launch Vehicle-II (KSLV-II), also referred to as Nuri, Korea's first domestically developed space launcher. The agreement represents the first full transfer of launch system technology to a private company in South Korea. The acquisition is central to Hanwha's strategy to establish a comprehensive space industry value chain. By aligning with affiliates such as Hanwha Systems and Satrec Initiative, the company aims to integrate space transportation, satellite production, and related services into a cohesive, private-sector-led space ecosystem.



Credit: Hanwha Aerospace/KARI

Space Force awards Boeing with \$2.8 billion contract

The U.S. Space Force has awarded Boeing a \$2.8 billion contract to build two secure communications satellites under the Evolved Strategic SATCOM (ESS) programme, with options for two more. ESS will replace the current AEHF system with enhanced cyber resilience and survivability for critical national security missions. The ESS programme is part of a broader satellite communications architecture expected to cost up to \$12 billion, including future satellite procurements and expanded capabilities such as Arctic coverage. Work on Boeing's contract is expected to be completed by 2033.



Somalia launches satellite-based weather monitoring and forecasting system

The Somali Civil Aviation Authority (SCAA) has launched a new satellite-based weather monitoring and forecasting system, significantly advancing its meteorological and aviation capabilities. Supported by the African Union, EU, and EUMETSAT, the system features the Meteosat Third Generation satellite, a PUMA-2025 workstation, and access to the ClimaSA platform. A dedicated data receiver in Mogadishu ensures continuous access to high-resolution satellite data, aimed at enhancing severe weather monitoring, aviation safety, and climate resilience. The system is designed to significantly increase Somalia's capacity to support aviation operations and respond to rapidly changing atmospheric conditions.



Credit: SCAA

OHB Digital Connect uses AI to enhance weather satellite data resolution

OHB Digital Connect is developing an AI-based application for EUMETSAT to improve the spatial resolution of weather data from the MTG-I1 satellite. By combining multiple images using super-resolution techniques, the system enhances detail, helping to better capture local extreme weather events. The project supports climate and weather models in Belgium and Switzerland and forms part of the EU's Destination Earth (DestinE) initiative, which aims to build a digital twin of Earth by 2030.

Colombian IGAC expands multi-year contract with Planet

Colombia's Agustín Codazzi Geographic Institute, a national mapping and geographic institute responsible for producing and managing geographic data, has expanded its multi-year contract with Planet Labs. Under the contract, Planet will continue to supply IGAC with its national land management technology, including the Planet Insights Platform, Planet Change Detection for roads and buildings, SkySat Flexible Tasking, Planetscope Monitoring, and the Education & Research package. The expansion builds on a contract signed in 2023 between IGAC and Planet for the provision of advanced access to SkySat tasking and daily monitoring with Planetscope, aiming to enhance land-use planning and risk management across the country. With the expanded contract, IGAC plans to further leverage Planet data for regulation enforcement, disaster identification and monitoring, and land management.

The region of Catalonia to launch 6G research laboratory in LEO

The i2CAT research centre has awarded a €1.65 million contract to Catalan company Open Cosmos for the design, manufacture, integration, launch, and commissioning of the 6GStarLab satellite. The project represents Europe's first open 6G research laboratory in LEO and will focus on the research and development of non-terrestrial networks (NTN), aimed at enabling new communication technologies to be experimentally validated in a real space environment. NTNs are crucial for extending connectivity to remote regions unreachable by traditional infrastructure and terrestrial networks.



Chile publishes a National Space Policy

Chile has published its National Space Policy, approved by decree of the Ministry of Science, Technology, Knowledge, and Innovation, aiming to position Chile as a regional leader in space activities. The policy establishes a framework to advance sustainability, national security, and international cooperation in outer space. Structured around six pillars (cooperation, talent development, innovation, sustainability, security, and spatial planning), it promotes the peaceful use of outer space in alignment with UN principles, prioritising Earth Observation, disaster response, precision agriculture, and biodiversity protection. The policy is supported by recent institutional developments, including the creation of an Interministerial Commission on Space Matters and the Chilean Air Force Satellite Programme.

Canada awards \$10.6 million study contracts for lunar utility rover

The Canadian Space Agency has awarded Canadian space system specialists Canadensys Aerospace Corporation, MDA Space, and Mission Control with \$10.6 million worth of contracts for the assessment of options for a lunar utility rover. The contract represents part of a 13-year programme to expand Canada's role in the Artemis programme and human exploration of the moon through the development of a utility rover. Canada is leading the project, with procurement requiring a minimum of 60% domestic content initially, increasing to 80% in later phases. The rover is intended as a contribution to the Artemis programme, in return for Canadian astronaut participation in future U.S. missions.

ESA and Frazer-Nash launch INVICTUS programme



Credit: ESA

ESA and UK-based Frazer-Nash have launched INVICTUS, a research programme aimed at developing hypersonic technologies for future reusable horizontal-launch vehicles. INVICTUS is funded by ESA's General Support Technology Programme (GSTP) and Technology Development Element (TDE) with the objective of developing a Mach 5 experimental aircraft for testing hypersonic flight technologies. The fully reusable vehicle will feature modular design for upgrading materials, propulsion, and software between tests. It will demonstrate a hydrogen-fuelled precooled air-breathing engine, building on ESA's earlier SABRE technology from Reaction Engines Ltd. The system cools superheated intake air instantly, enabling horizontal take-off and orbital capability, paving the way for spaceplanes. The programme will support dual-use applications and aims to strengthen Europe's technological leadership in hypersonics and access to space.



NASA launches TRACERS mission to study Earth's magnetic shield

On 23 July 2025, NASA launched the Tandem Reconnection and Cusp Electrodynamic Reconnaissance Satellites (TRACERS) aboard a SpaceX Falcon 9 from Vandenberg Space Force Base. The twin satellites are designed to study magnetic reconnection in Earth's polar cusp, improving understanding of how solar wind affects space weather. Three small satellites, Athena EPIC, PExT, and REAL were also aboard, aimed at demonstrating new technologies and supporting space science. TRACERS is led by the University of Iowa and managed by NASA's Heliophysics Explorers Programme.



Credit: SpaceX



In other news

The Kenyan Space Agency and STAR. VISION Aerospace conclude the Spaceborne AI Algorithm Rideshare Programme. The initiative involved 58 students from 14 Kenyan universities developing AI solutions for Earth Observation applications.

GGPEN and SANSa sign MoU to enhance bilateral cooperation in the space sector. The Angolan National Space Programme Management Office (GGPEN) has signed a Memorandum of Understanding with the South African National Space Agency to advance collaboration in science, technology, and space applications.

New U.S. tax provision to benefit SpaceX and Blue Origin. A new provision in the Trump Administration's recently signed tax and spending bill allows spaceports, spacecraft manufacturing sites, and mission control centres to be financed using tax-exempt private activity bonds, lowering borrowing costs for private space companies like SpaceX and Blue Origin.

Senegal becomes the fourth African country to join the Artemis Accords. On 4 July 2025, Senegal signed NASA's Artemis Accords to support peaceful lunar activities aligned with the Artemis programme. Senegal is now one of two nations participating in both the U.S.-led Artemis framework and China's International Lunar Research Station (ILRS) initiative.



INDUSTRY & BUSINESS

SES completes acquisition of Intelsat

SES has finalised its acquisition of Intelsat, creating a global multi-orbit satellite operator with a fleet of 120 GEO and MEO satellites and access to LEO systems. The merger strengthens the capacity of SES to deliver integrated connectivity services across government, aviation, maritime, and media sectors. With projected annual revenues of €3.7 billion and over €8 billion in contract backlog, SES plans to expand into emerging markets such as IoT and direct-to-device communications, while targeting €2.4 billion in synergies and increased shareholder returns.

Eurospace releases 29th annual “Facts & Figures” report

Eurospace, the trade association for the European space manufacturing industry, has released the 29th edition of its annual “Facts & Figures” report. The report provides statistics on the economic performance of Europe's space systems manufacturing sector, focusing on design, development, and production activities, excluding services like satellite operations and launches.

Key highlights from the 2025 report include:

- Employment in the sector exceeded 66,000 full-time equivalents, driven largely by start-up growth, creating over 10,000 new jobs in the past seven years.
- Final sales to institutional programmes have increased by 6.1%, rising from €5.97 billion (2023) to €6.3 billion (2024).
- Exports remain strong, with European space systems generating a trade surplus of \$180 million annually, though a \$200 million deficit in launch services persists due to the favouring of non-European providers.
- Industry concentration remains high, with the top 30% of companies accounting for approximately 70% of employment, while smaller companies, including many start-ups, add diversity but contribute less to overall revenue.

Rocket Lab launches four Hawkeye 360 satellites

Rocket Lab successfully launched four satellites for Virginia-based Hawkeye 360 on June 26 from Launch Complex 1 in New Zealand. The Electron rocket carried three radio frequency geolocation satellites, which form part of Hawkeye 360's “Cluster 12”, as well as an experimental payload, Kestrel-0A. The mission aims to expand the company's capacity to monitor global radio signals and support future technology development. This represents the second of three planned missions Rocket Lab will conduct for Hawkeye 360, which will deploy 15 satellites in total.



Credit: Rocket Lab



Swedish Space Corporation establishes office in Tokyo

The Swedish Space Corporation (SSC) has established a new office in Tokyo, Japan, as part of its long-term strategy to expand its presence in the Japanese space market and deepen bilateral engagement. The Tokyo office aims to support closer collaboration with local customers and facilitate the development of tailored solutions for the Japanese space sector.

Liberatech Space introduces tailored EO solutions for key sectors



Credit: Liberatech

Liberatech Space has introduced a new line of custom Earth Observation products targeting the commodities, energy, and environmental sectors. Developed in close collaboration with users, ranging from mining investors to forest managers, the solutions are designed to address specific operational challenges rather than one-size-fits-all analytics. The initiative is strengthened by a partnership with KSAT, integrating Liberatech's AI-enhanced analytics with KSAT's global ground station network and SAR capabilities to deliver near real-time insights.

Thales Alenia Space and SpeQtral sign agreement for quantum communications

Thales Alenia Space has signed an agreement with Singapore-based quantum communications company SpeQtral to jointly test quantum communication links between satellites and Earth. The collaboration will involve SpeQtral's in-development quantum satellites, and a quantum ground station developed by Thales Alenia Space, equipped with sensors to assess environmental impacts on signal quality. The experiments aim to validate key technologies for future global quantum networks, including the transmission of entangled photons. In later phases, Thales Alenia Space plans to launch its own quantum satellite, QINSAT.

Exolaunch announces new collaborations with Japanese partners

Exolaunch has signed a multi-launch agreement with Japanese space technology company Synspecive for the launch of 10 Synspecive StriX-series SAR satellites across multiple missions, with the initial launch scheduled for 2027. Under the contract, Exolaunch will provide mission management and satellite deployment services across multiple launches. Exolaunch has also signed a Strategic Partnership Agreement with Japan's Interstellar, aiming to enhance rideshare launch capabilities for small satellites across the Asia-Pacific region and beyond. Under the agreement, Exolaunch becomes the preferred provider of satellite separation systems for Interstellar's ZERO launch vehicle and will receive priority access to multi-launch contracts and unused payload capacity. The collaboration combines Interstellar's developing launch capabilities with Exolaunch's flight-proven deployment systems, aiming to improve access to orbit for regional and global satellite operators.



Credit: Synspecive



Exolaunch and Orbex sign partnership to provide small satellite launch services



Credit: Orbex

Exolaunch and UK-based Orbex have signed a five-year strategic partnership to deliver end-to-end services for small satellites. The agreement will see Exolaunch integrate customer payloads onto Orbex's Prime and upcoming Proxima launch vehicles, while providing its flight-proven deployment systems, including the modular EXOtube platform. The partnership aims to support dedicated and rideshare missions, with both companies collaborating on mission planning, satellite integration, and launch execution.

South African companies contribute over 100 components to SpaceX mission

Six South African space companies have supplied a total of 116 components to the SpaceX Transporter-14 rideshare launch. The contributing firms, Simera Sense, Dragonfly Aerospace, CubeSpace, NewSpace Systems, CubeCom, and Chromar Technology, delivered a variety of imaging payloads, satellite subsystems, ADCS units, communications systems, and navigation components. Transporter-14 placed over 80 payloads into LEO, serving a broad range of operational, research, and commercial needs.

SatRev establishes joint venture company in Oman

Polish space industry startup SatRev has launched Spazers, a joint venture with the Omani government and technology company Tuatara, to provide satellite manufacturing, launch services, and ground infrastructure in the Middle East. Based in Oman, Spazers will build satellites for communication, Earth Observation, and research, aiming to serve both government and commercial clients in the region. The initiative builds on SatRev's prior cooperation with Oman and represents a strategic expansion into the Middle Eastern space market.

Ax-4 Crew returns after completing private Axiom-4 space mission

On July 15, 2025, the Axiom Mission 4 (Ax-4) crew safely returned to Earth, landing off the coast of California after an 18-day mission aboard the International Space Station (ISS). The mission, led by U.S. astronaut Peggy Whitson, included crew members from India, Poland, and Hungary. During their time on the ISS, the crew conducted over 60 scientific experiments, with research contributions from 31 countries. Ax-4 is the fourth private astronaut mission to the ISS organised by Axiom Space and represents part of the company's broader initiative to expand access to LEO ahead of its planned commercial space station.

Satellite connectivity expands in offshore energy sector

According to media reports, the offshore energy sector is driving increased demand for satellite connectivity, with projected global spending exceeding \$650 million in 2025. Operators rely on GEO, MEO, and LEO systems to support remote operations, data transfer, and monitoring across oil, gas, and renewable projects. Service and support vessels represent the largest growth segment, with 88% expected to adopt LEO broadband by the end of 2025.



SpaceX launches 3rd batch of Amazon's Kuiper Satellites



Credit: SpaceX

On July 16, SpaceX launched 24 satellites for Amazon's Project Kuiper aboard a Falcon 9 rocket from Cape Canaveral, representing the third mission for the broadband megaconstellation. The rocket's first stage successfully landed on the SpaceX drone ship, while the satellites were deployed to LEO to later reach their final altitude. Project Kuiper aims to deploy over 3,200 satellites to provide global internet coverage.

SpaceX develops new business for space-based manufacturing

SpaceX is currently in the process of developing "Starfall", a new business aimed at facilitating space-based manufacturing. This will involve the use of Starship in the deployment of returnable lab and factory capsules into LEO. This approach differs from competitors like Axiom, Vast, and Blue Origin, which are focused on building full-scale space stations. Starfall aims to support the production of high-value items such as pharmaceuticals, computer chips, and bioprinted organs using the unique conditions of space. The business is expected to launch by the end of the decade, aligning with the planned decommissioning of the ISS in 2030.

SpaceX launches 28 Starlink satellites into LEO



Credit: SpaceX

On 29 July 2025, SpaceX successfully launched 28 Starlink satellites into LEO using a Falcon 9 rocket from Cape Canaveral, Florida. The rocket's first stage, completing its 26th flight, landed safely on the dronship named "Just Read the Instructions" in the Atlantic. This represents SpaceX's 96th mission of the year, bringing the active Starlink satellite count to over 8,050.

Gilmour Space Technology conducts first launch attempt of its Eris rocket

On 29 July 2025, Gilmour Space Technologies conducted the first launch attempt of its Eris rocket, representing Australia's debut orbital rocket launch from domestic soil. The rocket lifted off from the Bowen Orbital Spaceport in Queensland but experienced a deviation shortly after launch and returned to Earth approximately 14 seconds later. Despite the brief flight, the mission provided valuable data. Gilmour Space emphasised the significance of the test as a step forward in developing national launch capabilities and confirmed preparations are underway for a second test flight.



Credit: Gilmour Space Technologies



In other news

ATLAS Space Operations expands network with Rwanda Ground Station. ATLAS Space Operations has activated a new antenna in Rwanda to support NOAA's COSMIC-2 weather satellites, enabling faster data delivery and strengthening its African ground network alongside sites in Ghana and Tahiti.

Intelsat launches 2025 Africa Space STEM programme. Intelsat and MaxIQ have selected 12 schools in four African countries for practical satellite training, aimed at advancing STEM education across Africa.

EarthDaily secures \$60 million for satellite deployment. Earth Observation solutions provider EarthDaily Analytics has secured \$60 million from alternative asset manager Trinity Capital. The financing aims to support the deployment of the EarthDaily Constellation, a 10-satellite system designed to deliver Earth Observation services combined with AI and geospatial analytics.



INVESTMENT & FINANCE

Varda Space raises \$187 million for medicine in space



Credit: Varda Space

Varda Space has secured \$187 million in a Series C round co-led by Natural Capital and Shrug Capital. The U.S. startup builds re-entry capsules enabling both proprietary drug manufacturing and third-party microgravity research, and also serves as a hypersonic testbed for the DoD. Varda works with pharmaceutical manufacturers to address issues like crystallisation or purity, with **revenues coming from licensing IP patents and subsequent royalties on a per-drug basis**. The funding will go towards the construction of a laboratory, enabling Varda's scientists to screen and prepare formulations of relevant drugs to accelerate the flight cadence. **Capsule manufacturing capability is also expected to double in 2026, from two to four.**

Interstellar Technologies secures over \$60 million for ZERO launcher

The Japanese company has raised **¥6.5 billion (approx. \$45.1 million) in a Series F round, complemented by ¥2.4 billion (approx. \$16.7 million) in debt financing**. Interstellar currently works on its small-lift ZERO launcher, and has flown its Momo suborbital rocket seven times, for four failures. The company has also signed business agreements with two of its investors: the Japanese financial institution Sumitomo Mitsui Banking Corporation, to strengthen its supply chains and bring satellite development in-house in an assumed effort to replicate SpaceX' vertically integrated business model; and Woven by Toyota*2, to leverage the car manufacturer's mass production know-how. The investment will enable further development of ZERO and satellite systems R&D.

Open Cosmos acquires Connected, builds IoT connectivity unit

British satellite manufacturer and mission operator **Open Cosmos has acquired Portuguese startup Connected** for an undisclosed fee. Connected develops a 5G connectivity network, hosted aboard third-party satellites to connect remote IoT devices. The acquisition came as Connected was raising its Seed round, following \$2 million in pre-Seed in February 2024. The Portuguese startup will become Open Cosmos' dedicated IoT connectivity unit, complementing its EO and data services, and will now fly aboard its platforms. Open Cosmos will also expand operations in Portugal, expecting to invest over €50 million over the next three years.

Neo Space Group completes acquisition of UP42, enhances EO capabilities

Space services company **Neo Space Group (NSG), owned by Saudi Arabia's Public Investment Fund, has completed the acquisition of UP42** from Airbus Defence and Space for an undisclosed amount. UP42, founded by Airbus in 2019, is an Earth observation, cloud-based digital platform offering organisations geospatial data access and analysis. The acquisition will deepen NSG's market reach and technological expertise, and offer it access to UP42's range of geospatial assets. UP42 would benefit from accelerated international growth and enhanced innovation drive.



Credit: UP42



York Space Systems to acquire ATLAS, adds ground software to portfolio



Credit: York Space Systems

The parent company of **York Space Systems** has agreed to **acquire ATLAS Space Operations** for an undisclosed fee, and pending regulatory approval. York Space Systems manufactures small satellite platforms and delivers end-to-end mission solutions, while ATLAS operates a federated antenna network and offers spacecraft communications services through its Freedom software. The acquisition will support York's contribution to U.S. missile warning and warfighter connectivity efforts - building on its **\$237 million U.S. Space Force small-satellite contract** for proximity operations, SSA, and Golden Dome demonstrations - and integrate ATLAS's software-defined ground segment into its Golden Dome architecture proposals.

Firefly Aerospace files IPO prospectus

U.S. launch company **Firefly Aerospace** has filed a registration statement with the **U.S. Securities and Exchange Commission**, with **16.200.000 shares being offered and an offering price between \$35 and \$39 per share**. In the prospectus, Firefly has outlined a growth strategy, which includes global expansion of its Alpha launch capabilities, continued development of its medium-lift Eclipse vehicle with Northrop Grumman, and increased flight cadence for its Blue Ghost lunar lander and Elytra spacecraft. The company is also exploring M&A opportunities, particularly in software, to enhance verticalization, support national security missions, and automate production.

Space Cargo Unlimited secures €12.5 million from the EIC for re-entry platforms

Space Cargo Unlimited was awarded **€12.5 million in blended investment**, combining grant and equity, from the EIC Accelerator. The French startup develops BentoBox, a re-entry orbital platform providing a controlled environment for microgravity experiments. Space Cargo conducted two pilot missions to the ISS between 2015 and 2021, focused on agriculture and viticulture, identifying a need for "autonomous, human-independent payload systems". The funding will go towards the accelerated development of BentoBox to serve a pipeline of 82 customer projects across the biotechnology, pharmaceuticals and advanced materials sectors.

Reaction Dynamics secures approx. €9 million for hybrid launch systems

Reaction Dynamics has raised **CAD \$14 million (approx. €9 million) in a Series A** round, adding to a CAD \$10 million grant from the Government of Quebec in June 2025. The Canadian start-up manufactures Aurora, a small-lift rocket powered by hybrid propulsion and comprised of only a dozen parts compared to about 15,000 in traditional liquid engines, the company says. Reaction Dynamics also offers spacecraft propulsion systems for orbital transfers, collision avoidance, and de-orbiting. With engine testing underway, the investment will support further development of the system as well as a first suborbital demonstration planned for this winter.



Credit: Reaction Dynamics



LGND raises \$9 million for geospatial data analysis



Credit: LGND

LGND has secured **\$9 million in a Seed round** led by Javelin Venture Partners. The U.S. startup seeks to facilitate the handling of geospatial data by leveraging vector embeddings, which summarise spatial data in patterns algorithms quicker and cheaper analyse. LGND's platforms enable its customers to query their datasets and obtain insights quicker, the company says. The startup has not detailed how it intended to use the capital.

Chloris Geospatial secures \$8.5 million for carbon monitoring

Chloris Geospatial has raised **\$8.5 million in a Series A** round led by Future Energy Ventures. The U.S. startup uses algorithms which fuse satellite data to quantify carbon stocks in forests and monitor ecosystem change. Chloris' customers include corporations and public actors working to assess risks related to forest-related supply chains, and to meet climate objectives and standards. The investment will be leveraged to grow the workforce, tie new partnerships, accelerate product development, and expand global presence through the opening of a European hub.

Skygate Technologies raises approx. €6 million for space security services

Skygate Technologies has secured **¥1 billion (approx. €6 million) in a funding round**. The Japanese startup offers both a Ground-Station-as-a-Service offering for commercial satellite operators but has recently pivoted towards security-centred products, such as JADC2 Alayasiki, an integrated Command-and-Control platform for the space and cyber domains. In a context of increased defence spending in Japan, Skygate was notably awarded a contract from the Japan Air Self-Defence Force to develop security standard guidelines for space systems. The funding will enable further investment in R&D and business development.

Spaceflux secures £5.4 million for satellite tracking

Spaceflux has raised **£5.4 million in a Seed round** co-led by the UK Innovation & Science Seed Fund (managed by Future Planet Capital), Foresight Group, and Blackfinch Ventures. The UK startup operates ground-based sensors and an AI-driven platform, Cortex, to deliver SSA to government and commercial clients. Spaceflux has notably become the exclusive provider of geostationary satellite tracking for the UK MoD and UK Space Agency in 2023. The new funding will support Spaceflux in expanding its global sensor network, enhancing its Cortex analytics platform, and growing its commercial services for satellite operators, insurers, and government agencies.



Credit: Spaceflux



Transcelestial raises \$5.7 million for laser communications



Credit: Transcelestial

Transcelestial has secured **\$5.7 million in a Series B** round co-led by NTT Finance – the finance arm of Japan's telecommunications conglomerate – and Australian VC firm Paspalis Capital. The Singaporean startup develops a suite of laser communication products, including optical ground stations, downlink terminals, and inter-satellite links. Its CENTAURI technology, deployed between physical infrastructures, enables high-speed and secure connectivity without physical fibre. With this investment, Transcelestial plans to expand into defence markets and enhance critical infrastructure in Japan and Australia, deploying its technology for national security, disaster resilience, and space-based connectivity.

Quadsat secures €5 million for electronic warfare capacities

Quadsat has raised **€5 million in an extension of its Series A round** co-led by Join Capital and North Ventures. The Danish startup offers calibration services for satellites communication antennas, and calibration of satellite communication antennas and provide electromagnetic spectrum intelligence tools for defence missions. The company has notably partnered with ESA, OneWeb, Eutelsat, and ALL.SPACE in conducting antenna validation missions. The capital will enable the company's expansion in the defence sector.



In other news

Auriga Space secures \$4.6 million in a Seed round led by European firm OTB Ventures: the U.S. startup develops a launch system based on a long track equipped with magnets and ending in a ramp, with the vehicle igniting its engine after being ejected from the track. The company will use the funding to attempt commercialising hypersonic testing in 2026, by completing the construction of its indoor lab-scale facility called Prometheus.

Apolink secures \$4.3 million in a Seed round: The U.S. startup is developing a constellation of 32 LEO satellites designed to provide continuous, real-time communication for spacecraft beyond the line of sight of ground stations. Apolink is planning a demonstration mission in Q2 2026. The funding will enable spacecraft integration, testing, and validation.

Benchmark Space Systems raises \$2.4 million through equity sale: According to recent SEC filings, Benchmark Space Systems has secured \$2.4 million through the sale of equity. The U.S. startup specialises in the development of both chemical and electric propulsion systems. The specific use of the newly raised funds has not been disclosed.

Genesis Space Flight Laboratories secures €300k in pre-Seed from Fil Rouge Capital: The Croatian startup is developing a re-entry spacecraft, GEN, designed for microgravity research missions. In June 2025, Genesis coordinated the MayaSat-1 mission, a biological incubator that launched aboard Transporter-14, and plans to launch a demonstrator in 2027. The investment will allow the beginning of manufacturing operations.

Remo-Telight raises an undisclosed amount in a Pre-A round led by Guohai Innovation Capital: the Chinese company manufactures remote sensing and laser communication payloads, and has participated in several national projects such as the "State Grid" for satellite Internet. The capital will fund R&D and accelerate product commercialisation.

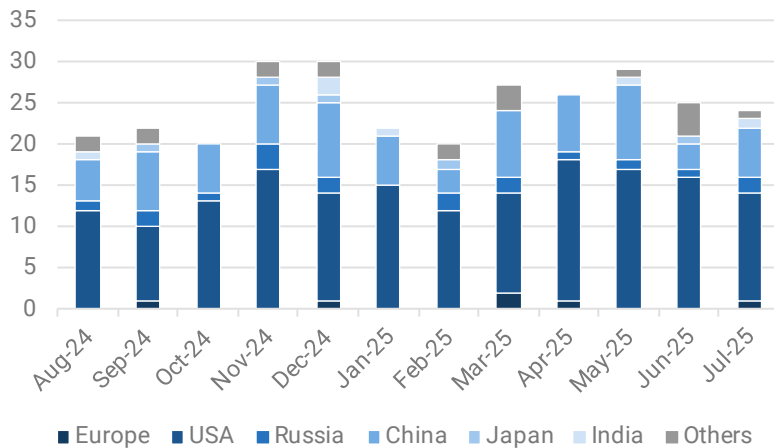


LAUNCHES & SATELLITES

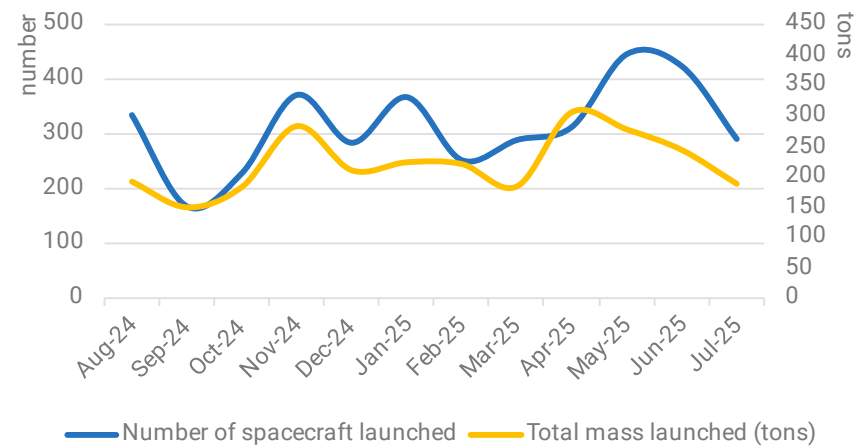
Global space activity statistics

July 2025	Europe	USA	China	Russia	India	Other	Total
Number of launches	1	13	6	2	1	1	24
Number of spacecraft launched	5	243	18	21	1	1	289
Mass launched (in kg)	1180	143 085	32 600	8355	2393	1	187 614

Launch activity over the year



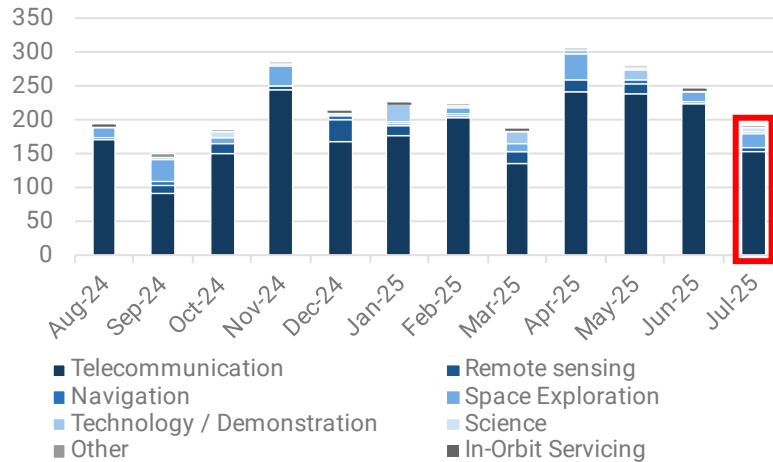
Evolution of the number of launches per launch country



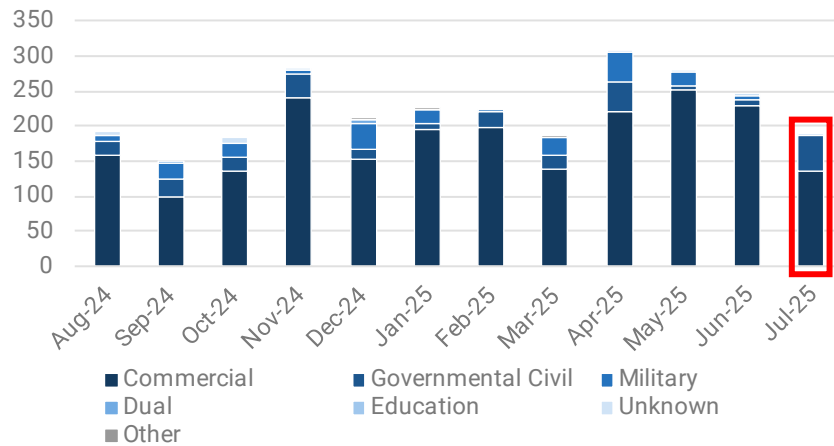
Evolution of launch activity over the year 2024-2025



Satellite missions and markets



Evolution of the total mass launched (tons) per mission (Aug. 2024-Jul. 2025)



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

July 2025	Telecommunication	Remote sensing	Exploration	Science	Tech/ Dem.	Other
Europe	3400	4980			16	
USA	130 500			2797	190	
China	14 000	200	14 000		4000	
Russia		5		865		40
Japan			7280		55	
Other	4885	400			1	

Total mass (kg) launched by mission and customer country

July 2025	Commercial	Governmental. Civil	Unknown
Europe	3416	4980	
USA	130 500	2937	
China	200	32 000	
Russia	65	8140	40
Japan			
Other	275	5010	

Total mass (kg) launched by market and customer country

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