



ESPI

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Policy Institute

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Space Sector Watch



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Schwarzenbergplatz 16, TOP 1 | A-1010 Vienna, Austria
Phone +43 1 718 11 18 - 0 | E-Mail: office@espi.or.at



POLICY & PROGRAMMES

Europe's first MetOp Second Generation satellite launches on Ariane 6

On August 13, an Ariane 6 rocket successfully lifted off from Europe's Spaceport in French Guiana carrying MetOp-SG-A1, the first of Europe's next-generation weather satellites. The spacecraft is the first in a planned series of three successive satellite pairs that will extend global polar-orbiting observations for weather forecasting and climate analysis for more than two decades. Compared to the original MetOp mission, the new system offers higher accuracy, improved resolution, and additional measurement capabilities. MetOp-SG-A1 also hosts the Copernicus Sentinel-5 mission, which will provide daily global data on air pollutants, atmospheric trace gases, aerosols, and ultraviolet radiation, enhancing Europe's ability to monitor both climate and air quality.



Credit: Arianespace

UK Space Agency to join Department for Science, Innovation and Technology

The UK Government has announced that the UK Space Agency will be integrated into the Department for Science, Innovation and Technology by April 2026, aiming to strengthen support for the UK space sector. The change is intended to align policy with implementation, reduce duplications, and increase efficiency, while maintaining the UKSA name and brand. The move forms part of the UK Government's **Plan for Change**, which seeks to streamline public bodies and improve accountability across Whitehall. By bringing space policy and implementation under one roof, ministers aim to provide clearer oversight and stronger support for the UK's growing space sector. Alongside the announcement, over 60 industry-led recommendations on smarter regulation have been published, including proposals for Rendezvous and Proximity Operations.

French government grants Avio 10-year launch licence

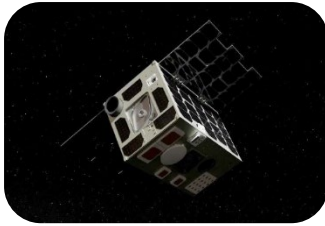


Credit: ESA

The French government has issued Italian launch provider Avio a ten-year licence to operate Vega rockets from the Guiana Space Centre, enabling the company's transition to independent operations after separating from Arianespace. The licence follows the 2023 Space Summit agreement allowing Avio to market and manage Vega launches directly. Avio will assume responsibility with the Vega C flight VV30 scheduled for later in 2025, initially using the ELV pad and later shifting to ELA-3 for the future Vega E, expected to debut in 2027-2028. According to the French government, the move reinforces the Guiana Space Centre's role as a European spaceport and supports Europe's independent access to space.



France awards Infinite Orbits €50 million PALADIN contract for national defence



Credit: Infinite Orbits

The French Directorate General of Armament (DGA) has awarded Infinite Orbits a €50 million contract for the development of PALADIN, a geostationary satellite-inspection service for the nation's Space Command. The programme forms part of France's Action et Résilience Spatiale (Space Action and Resilience) initiative to monitor and protect military space assets and will complement the YODA satellites as a precursor to the planned ÉGIDE (Geosynchronous drift intervention and deterrence vehicle), which is scheduled to be operational by 2030. PALADIN will be based on Infinite Orbit's Orbit Guard platform, which offers rendezvous, inspection, and autonomous manoeuvring capabilities. The spacecraft could launch as early as 2027.

Portugal grants ASC 5-year licence for Santa Maria launch facility

Portugal has authorised the Atlantic Spaceport Consortium (ASC) to build and operate a launch facility on Santa Maria Island, Azores under a five-year licence issued by the national regulatory authority for communications, ANACOM. The licence includes site construction and operations, but individual rocket launches will require separate approval. ASC plans to begin with suborbital missions, including Poland's SpaceForest Perun rocket in 2026.



Credit: Atlantic Spaceport Consortium

Santa Maria is also designated as the landing site for ESA's reusable Space Rider spacecraft, with its first flight expected no earlier than 2027.

EU and US sign trade deal with implications for the space sector

The European Union and the United States have signed a new trade agreement, including measures that affect Europe's space industry. Industrial metals such as steel, aluminium, and copper, which are essential for rockets, satellites, and launch infrastructure, remain subject to a 50% U.S. import tariff, while most other EU exports face a 15% tariff. The deal also commits the EU to purchase €40 billion in U.S.-produced artificial intelligence chips, which are increasingly used in satellites for autonomous operations and onboard data processing. At the same time, European semiconductor exports to the U.S. will be subject to a 15% tariff.

ESA and European Commission sign agreements with Avio and Isar Aerospace

ESA and the European Commission have signed commercial launch service agreements with Avio and Isar Aerospace. The agreements form part of the Flight Ticket Initiative, a joint ESA-European Commission programme funding in-orbit demonstration and validation missions to test new space technologies on European launchers. Three missions are scheduled on Avio's Vega-C from French Guiana: Spain's Persei E.T. Pack to trial a fuel-free deorbit system, Germany's DLR Pluto+ cubesat to demonstrate compact avionics and solar arrays, and France's Grasp GapMap-1 to measure greenhouse gases. Two further missions will fly on Isar Aerospace's Spectrum from Norway: Infinite Orbits' debris-removal demo using a dual-satellite approach, and an Ispac cluster of cubesats hosting multiple technology experiments. The initiative forms part of ESA's Boost! programme, intended to promote competition and expand Europe's commercial launch market.



India and Japan sign agreement for Chandrayaan-5 mission

India and Japan have signed an implementing arrangement for Chandrayaan-5, a joint lunar exploration mission to the lunar South Pole. The agreement between ISRO and JAXA regarding the joint lunar exploration mission (LUPEX) was signed during Prime Minister Modi's visit to Tokyo, with the pact exchanged by JAXA Vice-President and India's Ambassador to Japan. The mission, to be launched by JAXA's H3-24L rocket, will carry an ISRO-built lunar lander with a Japan-made rover. ISRO is also developing scientific payloads, alongside contributions from ESA and NASA. Equipped with seven instruments, the mission will map lunar water, drill regolith for analysis, and conduct in-situ measurements. It is designed for 100 days, extendable to a year, with exploration of the Moon's far side an additional objective.



Credit: Prime Minister Office, Japan

U.S. Armed Forces and Avio sign Tactical Propulsion Agreement



Credit: Avio

The U.S. Armed Forces have signed a new Tactical Propulsion Agreement with Italian rocket builder Avio to produce solid rocket motors for tactical missiles. The deal includes manufacturing, assembly, integration, and testing capacity, with options for future growth. Avio established a U.S. subsidiary in 2022 to address shortages in domestic propulsion production and partnered in 2024 with the U.S. Army's Combat Capabilities Development Command Aviation & Missile Center to develop surface-to-air propulsion systems.

Germany releases the "Hightech Agenda Deutschland" on AI, space, and energy

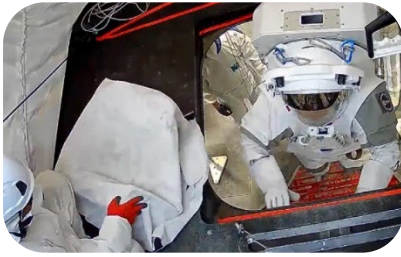
Germany has released the "Hightech Agenda Deutschland" to boost economic growth, jobs, and technological autonomy. The strategy prioritises six key fields: AI, quantum technologies, microelectronics, biotechnologies, fusion and climate-neutral energy, and climate-neutral mobility. It also highlights the growing commercialisation of space, with aerospace considered crucial for security, sovereignty, and climate objectives, and notes the potential of emerging propulsion technologies.

Turkish university to send two rovers on Chang'e-8 to lunar South Pole

Middle East Technical University (ODTÜ) has announced plans to deploy two autonomous micro rovers to the Moon's South Pole as part of China's Chang'e-8 mission, representing the first time two rovers will be landed and operated simultaneously. The AI-powered rovers, named CHERI, each weigh around 5 kilograms, are shoebox-sized, and are designed to withstand lunar conditions. They are designed to conduct 3D mapping, measure temperature and radiation, and share navigational data. Plans also include releasing the rovers on different days, with the second capturing the descent of the first on video to provide valuable documentation. The project is led by ODTÜ in partnership with China's Star Vision and Zhejiang University.



Airbus and Spartan Space complete CNES lunar airlock study



Credit: Spartan Space

Airbus Defence and Space and Spartan Space have concluded a CNES-commissioned feasibility study for a lunar habitat airlock under the Lunar Integrated Shelter for Exploration (LSE) initiative. The study was carried out over a period of 15 months and focused on solutions for dust mitigation, crew safety, thermal control, and a lifting system to recover incapacitated astronauts from the lunar surface. A full-scale prototype was tested with Spartan's EUROHAB inflatable habitat at the DLR-ESA LUNA

facility in Cologne. The airlock study forms part of CNES' broader Spaceship France programme, which also includes work on a lunar power station module, spacesuit development with Decathlon, and medical imaging technologies.

Ukraine to roll out Starlink satellite messaging nationwide

Ukraine will become one of the first countries to introduce SpaceX's Starlink Direct to Cell service, enabling text messaging via satellite without mobile coverage. The system is set to be introduced this autumn and requires only a standard 4G smartphone and a clear sky view. The technology is intended for use in remote or disconnected areas. Ukraine joins the U.S., Australia, Japan, Canada, and New Zealand in adopting the service.

ULA's Vulcan Centaur launches first national security mission



Credit: ULA

On 12 August 2025, the United Launch Alliance's Vulcan Centaur rocket completed its first national security mission, lifting off from Cape Canaveral Space Force Station in Florida. The vehicle launched with four solid rocket boosters, making it ULA's most powerful Vulcan to date, and carried the U.S. Space Force's Navigation Technology Satellite-3 (NTS-3) directly to geosynchronous orbit on a seven-hour flight. NTS-3 is the first experimental navigation satellite

launched by the U.S. military in nearly five decades. Built by L3Harris Technologies on a Northrop Grumman bus, it is designed to test new position, navigation and timing (PNT) technologies, including phased array antennas to counter jamming, and in-orbit reprogrammable software, aiming to enhance resilience against electronic interference.

NASA seeks industry input on future of Landsat programme

NASA has issued a Request for Information (RFI) to U.S. industry, universities, and government partners for concepts to sustain and extend the Landsat Earth Observation record beyond 2030. The Sustainable Land Imaging (SLI) Mission Alternatives Assessment Team (MAAT) is evaluating options for a more affordable Landsat-Next architecture in line with the FY26 budget request. Potential solutions include fully commercial systems, hybrid public-private approaches, data services, or disaggregated platforms. Solutions must meet specified technical requirements, be operational by 2031, and operate for at least five years. Responses will inform NASA's assessment of alternatives to the restructured Landsat-Next mission under the FY26 budget.



ESA opens first call for proposals at new Andalusia Business Incubation Centre



Credit: PLD Space

ESA has opened the first call for proposals at its new **Business Incubation Centre (BIC) in Andalusia, southern Spain**. Startups developing space-related technologies or applications can apply for a two-year programme offering up to €60,000 in non-repayable funding, technical support, and access to ESA experts and facilities. ESA's BIC initiative, running since 2003, now includes more than 30 centres across Europe that have supported around 1,500 startups. Andalusia's centre opened in

2025 near the Spanish Space Agency headquarters. Applications for the first intake close on 31 October 2025.

U.S. Army awards SES Space & Defense \$89.6 million contract

The U.S. Army has awarded SES Space & Defense a five-year **\$89.6 million Sustainment Tactical Network (STN) contract for commercial satellite communications services**. Under the contract, SES Space & Defense is responsible for providing Ku-band geostationary satellite communications and commercial teleport services. The agreement aims to support Combat Service Support, Department of Defense programmes, and U.S. Government agencies with satellite communications through commercial teleports, Global Network Centres, and terrestrial networks. SES previously supplied services under the WESS Comsatcom Network contract.

X-37B space plane launches on eighth mission

On 21 August 2025, the U.S. Space Force launched its **X-37B Orbital Test Vehicle, marking the spacecraft's eighth flight since 2010**. The mission lifted off at 11:50 p.m. EST from Kennedy Space Center's Launch Complex 39A aboard a SpaceX Falcon 9 rocket. Known as OTV-8, the Boeing-built reusable space plane will test laser communications and quantum inertial sensors in orbit, aiming to enable secure inter-satellite links and provide navigation capabilities in GPS-denied environments. The Air Force Research Laboratory, NASA, and the Defense Innovation Unit will be partners for the upcoming experiments. The X-37B is designed for long-duration flights and has previously supported experiments on space domain awareness and radiation effects.



Credit: SpaceX

U.S. President issues executive order on commercial space regulation

U.S. President Trump has signed an Executive Order, "**Enabling Competition in the Commercial Space Industry,**" directing reforms to **U.S. commercial space regulations**. The Department of Transportation is responsible for eliminating or expediting environmental reviews, revising launch and re-entry regulations, and strengthening oversight of the commercial space transportation office. The Department of Commerce must propose a framework for regulating novel space activities (mission authorisation) and elevate the Office of Space Commerce to the Secretary's office. Several agencies, including NASA and the Department of Defence, are instructed to coordinate on modernising spaceport infrastructure, aligning review processes, and streamlining approvals.



Namibia approves drafting of Space Science and Technology Bill



Credit: Emma Theofelus

Namibia's Ministry of Information and Communication Technology has approved the drafting of a national **Space Science and Technology Bill**, laying the foundation for a legal framework to guide Namibia's space activities. The bill aims to align national space science and technology with socio-economic development goals and will be prepared by the Ministry of Education, Innovation, Youth, Sports, Arts and Culture before being submitted to Cabinet for endorsement. It builds on the Namibia Space Science and Technology Policy launched in 2021, which set objectives for the application of space technologies in education, research, and environmental monitoring. The proposed bill seeks to integrate space technologies into national development planning, enhance institutional capacity, raise public awareness, and increase access to commercial applications.

Tanzania issues new satellite service regulations

The Tanzania Communications Regulatory Authority (TCRA) has introduced new guidelines for **Direct-to-Mobile (D2M) satellite services** and **satellite landing rights**. The D2M rules require satellite operators to obtain landing rights, partner with licensed Tanzanian mobile networks, and file joint applications covering spectrum use, coverage, and interference mitigation, with quarterly reporting obligations. **The landing rights framework applies to communications satellites**, obliging foreign operators to sell capacity only through licensed local providers. Direct-to-consumer models, such as those used by Starlink, are restricted without an additional service licence. Authorisations are valid for five years for non-geostationary satellites and fifteen years for geostationary systems.

EO AFRICA R&D Facility launches ten new African-European research projects

ESA's EO AFRICA Research and Development Facility has announced ten new **African-European research projects**, selected from 143 proposals under its fourth call launched in April 2025. The projects are scheduled to begin in September 2025, each receiving \$30,000 in funding over a period of 15 months along with access to cloud-based research tools, technical support, and integration into the EO AFRICA Network. The initiative was co-established by ESA and the African Union Commission with the goal of promoting collaborative Earth Observation research to address food and water security challenges across Africa. The selected projects cover water body monitoring, irrigation and yield forecasting, flood resilience, and invasive species monitoring.

Space42 signs MoU with Angola's Military Intelligence and Security Service

UAE-based Space42 has signed a five-year **Memorandum of Understanding with Angola's Military Intelligence and Security Service (SISM)**. The partnership was formalised during the UAE President's state visit to Luanda and aims to advance cooperation in satellite communications, Earth Observation, AI, high-altitude platforms, drones, border management, and command-and-control systems. Space42 already provides nationwide satellite broadband coverage in Angola through its YahClick service and plans to expand capabilities with the upcoming Thuraya-4 satellite.



South Africa hosts annual national space conference

On 20-22 August 2025, South Africa's third National Space Conference took place at the CSIR International Convention Centre in Pretoria.

The conference was hosted by South Africa's National Earth Observations and Space Secretariat (NEOSS) in collaboration with the South African National Space Agency (SANSA) and the Department of Science and Innovation (DSI). The theme of the conference "Space for Societal Resilience, Transformation and Intelligence" aimed to promote knowledge-sharing and innovation by bringing together diverse stakeholders from various sectors. During the conference, **the University of South Africa (UNISA) and China's STAR.VISION signed a strategic partnership** in space science, aiming to combine STAR.VISION's satellite platforms with the university's expertise in artificial intelligence and data science.



Credit: SANSA

Poland selects payloads for suborbital rocket launch

Poland's Łukasiewicz Research Network's Institute of Aviation has revealed the four payloads selected for a suborbital rocket launch funded by the Polish Space Agency.

The selected payloads are from SigmaLabs, Blue Dot Solutions, AstroFarms, and the national Military Institute of Aviation Medicine. The launch is part of a programme to demonstrate domestic launch capability and is expected to take place in October 2025 aboard SpaceForest's PERUN rocket, which can carry up to 50kg to around 60km altitude. PERUN was selected over the Institute's smaller Amber 2K rocket, which can carry approximately 20kg.



Credit: SpaceForest

Australia's internet network hires Amazon's satellite service

Australia's state-owned internet network NBN Co has signed a contract with Amazon's startup satellite service to deliver connectivity to regions beyond the reach of its terrestrial network, offering an alternative to Starlink. The deal aims to provide high-speed internet access to around 300,000 homes and businesses outside the accessibility range of NBN Co's terrestrial network. According to a joint statement from NBN and Amazon, LEO satellites from Amazon's Project Kuiper will begin service next year and are expected to replace two Australian government-owned satellites scheduled for decommissioning in 2032.



Nigeria and Brazil sign MoU for space technology collaboration

Nigeria's Minister of Innovation, Science and Technology has signed a strategic Memorandum of Understanding with Brazil's Minister of Science, Technology and Innovation, aiming to enhance bilateral collaboration in space technology, science, and research. The partnership will involve cooperation in climate monitoring, national security, space vehicles, capacity building, and technology transfer. It also includes the application of AI for forest conservation in the Amazon and Nigeria-Cameroon basins, alongside the use of EO for disaster resilience and food security. The MoU aligns with Nigeria's "Renewed Hope Agenda", under which the National Space Research and Development Agency (NASRDA) plans to launch four satellites, including three with optical payloads and one with synthetic aperture radar.



Credit: NASRDA



In other news

Luxembourg Space Agency signs MoU with the Boryung Corporation. In support of Boryung's global "Humans in Space" (HIS) initiative, the Luxembourg Space Agency has signed a Memorandum of Understanding with the Boryung Corporation.

Ghana and Japan sign MoU to advance national development. Ghana and Japan have signed a Memorandum of Understanding to advance collaboration in satellite technology, knowledge transfer, and space applications.

Starlink launches high-speed internet service in Somalia. Following approval from the National Communications Authority in April 2025, Starlink's internet service is now live in Somalia, with the goal of expanding digital inclusion across the country and reducing the digital divide.

Dr. Majed Ismail is appointed as Egyptian Space Agency CEO. Dr. Majed Ismail has been appointed as the new CEO of the Egyptian Space Agency for a one-year term, succeeding Prof. Sherif Sedky, who was appointed in August 2022 and served until August 2025.

European Commission's Joint Research Centre (JRC) releases Technical Report on the Copernicus Emergency Management Service's Global Flood Monitoring (GFM) product. The report presents the annual assessment of the quality of the product and service, based on the quarterly evaluations carried out throughout 2024.

Nigeria's egusi seed is launched into space. On August 1, 2025, egusi melon seeds from Oyo State, Nigeria were launched into space aboard a SpaceX Falcon 9 rocket as part of a multinational agricultural payload. It represents the first Nigerian item to reach orbit.



INDUSTRY & BUSINESS

Starship completes tenth test flight

On 26 August 2025, SpaceX's Starship vehicle carried out its tenth test flight from Starbase Texas, reaching a planned suborbital trajectory after liftoff at 19:30 EDT. The Super Heavy booster experienced an early shutdown of one engine, but the vehicle completed a nominal ascent burn. Starship deployed eight mass simulators for next-generation Starlink satellites, performed an upper-stage engine reignition, and re-entered over the Indian Ocean with visible damage before a controlled splashdown more than an hour after launch. The vehicle tipped over and broke apart on impact, as anticipated. The test follows three previous flights earlier this year that ended in anomalies. While demonstrating progress in flight objectives, milestones such as an in-orbit propellant transfer, required for NASA's Artemis 3 mission, remain pending.



Credit: SpaceX

EchoStar orders \$1.3 billion constellation from MDA Space

EchoStar has placed a \$1.3 billion order with Canadian manufacturer MDA Space for 100 Aurora satellites for a direct-to-device (D2D) constellation. The system could eventually expand to more than 200 satellites and will provide talk, text, and broadband services. Deliveries are planned for 2028, with commercial servicing starting in 2029. The total project cost is estimated at \$5 billion, funded by EchoStar, who intends to differentiate its service by providing wideband connectivity comparable to terrestrial 5G. The deal represents MDA Space's fourth major LEO constellation order in recent years.

Eutelsat and Nelco sign agreement for LEO services across India

Eutelsat and Tata Group company Nelco Limited have signed an agreement for the delivery of OneWeb LEO satellite connectivity services across India, including its borders, territorial waters, and remote regions. Under the agreement, Eutelsat's local subsidiary OneWeb India Communications will collaborate with Nelco to provide secure, low-latency LEO connectivity for users on land, at sea, and in the air. The partnership aims to expand reliable connectivity to remote regions, while supporting government and enterprise applications.

Eutelsat appoints Eric Labaye as new Chairman

Eutelsat's Board of Directors have appointed Eric Labaye as Board member and Chairman of Eutelsat Communications and Eutelsat SA, succeeding Dominique D'Hinnin. The Board also accepted the resignation of Michel Combes, co-opted Lucia Sinapi-Thomas as an independent member, and confirmed Guillemette Kreis as the French State's representative. Labaye will serve until the next General Meeting, where his appointment will be proposed for a full term.



The Exploration Company's Nyx Spacecraft clears initial ISS safety review

The Exploration Company's reusable Nyx Earth spacecraft has passed the first stage of the International Space Station (ISS) Safety Review, confirming that its preliminary design meets hazard-control requirements for visiting vehicles. Nyx is being developed under an ESA contract to provide cargo transport to LEO, with a first mission to the ISS planned for 2028 carrying 2.600 kilograms of supplies. The review was conducted by a joint NASA-ESA panel covering propulsion, guidance and control, power, structures, software, and crew safety. Completion of Phase 1 allows the project to proceed toward hardware testing and the Phase 2 review, which is scheduled for 2026.



Credit: The Exploration Company

Exolaunch deploys satellites on SpaceX mission



Credit: SpaceX

On 26 August 2025, Exolaunch successfully deployed a total of seven satellites for Capella Space, Pixxel, and an undisclosed U.S. commercial customer on SpaceX's NAOS mission from Vandenberg Space Force Base. For Capella Space, this marked Exolaunch's second launch, following Acadia-5 in 2024. Pixxel added three Firefly satellites, expanding its hyperspectral constellation after four earlier deployments with Exolaunch. Two satellites for the undisclosed customer were deployed using Exolaunch's CarboNIX separation systems. The mission forms part of Luxembourg's dual-use LUXEOSys programme and extends Exolaunch's role as a regular integrator on SpaceX rideshare flights, with the company having now deployed 580 satellites across 39 missions to date. Multi-year agreements signed in May secure Exolaunch's participation on Falcon 9 rideshares through 2028.

Anywaves establishes U.S. subsidiary to expand multinational presence

French antenna manufacturer Anywaves has launched Anywaves U.S., aiming to strengthen ties with American customers, refine product development, and contribute to the U.S. space industry through local partnerships and future assembly lines. To lead the new entity, Nicolas Hine has been appointed General Manager and will be responsible for overseeing U.S. operations.



Credit: Anywaves

Leaf Space and FOSSA Systems announce strategic partnership



Credit: Leaf Space

FOSSA Systems has partnered with Leaf Space to support the launch and operation of its next-generation IoT satellites, scheduled to fly on SpaceX's Transporter-15 mission. The satellites form part of FOSSA's planned seven-year-lifespan LEO constellation and aim to provide secure IoT connectivity for sectors including energy, agriculture, logistics, infrastructure, and defence, especially in remote regions.

Under the agreement, FOSSA will use Leaf Space's global Leaf Line ground station network for automated scheduling, TT&C, and payload data transmission.



LandSpace reports anomaly during rocket test

On 15 August 2025, Chinese start-up LandSpace reported a failure during the flight test of its **Zhuque-2E Y3 rocket**, after the vehicle experienced an anomaly shortly after liftoff from a commercial launch in northwestern China. The company has initiated an investigation, but no further details have been released. LandSpace became the first company worldwide to orbit a methane-fuelled rocket with the Zhuque-2 in July 2023 and has since tested multiple upgraded variants. A Zhuque-2E Y2 flight succeeded in May, marking progress in the development of methane-liquid oxygen propulsion, considered cleaner and more cost-effective than traditional fuels.

CAS Space launches Mexican femtosatellites

On 19 August 2025, China's CAS Space launched seven satellites aboard its solid-fuel **Kinetica-1 rocket** from a commercial site in northwest China. Among them were two femtosatellites, tiny spacecraft weighing less than 100 grams each, from Mexican start-up ThumbSat. The ThumbSat spacecraft represent Mexico's first commercial mission to LEO and the launch makes Mexico the second North American nation, after Canada, to orbit satellites on a Chinese rocket.



Credit: EPA

Esri, Microsoft, and Space42 launch Map Africa initiative

Esri, Microsoft, and Space42 have signed a five-year **Memorandum of Understanding to establish the "Map Africa Initiative"**, a programme to develop accurate and accessible base maps for all 54 African countries. The project was announced at Esri's 2025 User Conference and aims to strengthen geospatial infrastructure to support economic growth, disaster resilience, and technological innovation. Under the agreement, Space42 will lead fundraising, project implementation, and data processing using AI-powered Digital Twin models, while also driving research on new AI tools and automated workflows. Esri will coordinate base map creation through its GeoAI and remote sensing capabilities and establish regional hubs to train local teams. Microsoft will provide secure cloud infrastructure and a scalable AI framework via Azure to enable data integration and sharing.

KP Labs and Simera Sense sign MoU to formalise collaboration

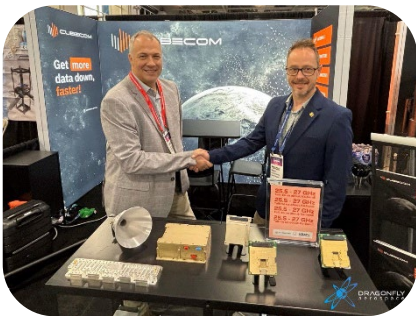
Poland's KP Labs and South Africa's Simera Sense have signed a **Memorandum of Understanding** at the 39th Annual Small Satellite Conference in Utah to deepen collaboration and advance joint development of integrated optical and onboard data processing systems for future missions. The partnership aims to deliver compact, intelligent payloads by leveraging Simera Sense's cameras and KP Lab's AI-powered data processing units. The collaboration will see its first deployment on ESA's OPS-SAT VOLT mission, scheduled for launch in mid-2026. The payload will integrate Simera Sense's HyperScope 100 multispectral camera with KP Lab's Leopard Data Processing Unit to demonstrate real-time onboard processing on a CubeSat platform.



Paratus launches “Connect2Care” solution for African health centres

Pan-African telecommunications provider Paratus Group has launched “Connect2Care” satellite connectivity solution for African health clinics and community centres. The initiative aims to provide high-speed, reliable internet to institutions across Botswana, Eswatini, Kenya, Malawi, Mozambique, Rwanda, and Zambia using Starlink’s LEO satellites and supported by Paratus’ local operations. The service targets health and community centres in critical need and will include 2TB of priority data to ensure stable, low-latency connectivity in remote and underserved areas beyond the reach of fibre and mobile networks.

Dragonfly Aerospace and CUBECOM sign compatibility agreement



Credit: Dragonfly Aerospace

Imaging satellite and payload provider Dragonfly Aerospace has signed a strategic compatibility agreement with South African satellite communication systems company CUBECOM.

The agreement aims to streamline integration between Dragonfly Aerospace’s imaging payloads and CUBECOM’s high-speed satellite transmitters. The collaboration seeks to address the challenge of transmitting large volumes of data from hyperspectral and multispectral cameras by pre-validating interoperability, enabling faster, more reliable downlinks. The agreement is intended to support applications such as

environmental monitoring, agriculture, and disaster response by reducing latency, streamlining integration, and providing an end-to-end data delivery chain from capture to downlink.

CipherSense AI launches CropSense to enhance agri-intelligence in Africa

CipherSense AI has introduced “CropSense”, an AI-powered platform that uses high-resolution satellite imagery and analytics to support African farmers, agribusinesses, and policymakers. The tool provides real-time crop monitoring, early pest and disease alerts, and yield predictions to improve productivity, reduce post-harvest losses, and strengthen food security. The platform offers various applications, including support for individual farms, financial services, supply chain optimisations, climate adaptation, and policy development.

BCG and Novaspace sign strategic collaboration agreement

Boston Consulting Group and Novaspace have signed a strategic collaboration agreement to pursue joint projects, business development, and thought leadership with a particular focus on Europe and the Middle East. The Gulf region is a specific priority, as governments there seek to expand national space presence to advance security, scientific research, connectivity, and technological innovation objectives. In the Gulf region, space investment is also considered to be closely connected to economic diversification beyond oil, promoting high-tech industries, and knowledge economies, whilst supporting practical applications for environmental monitoring, urban planning, and food and water security.



In other news

Blue Origin's New Shepard completes 34th mission. Blue Origin has completed its 34th New Shepard mission, carrying six passengers: Arvi Bahal, Gökhan Erdem, Deborah Martorell, Lionel Pitchford, J.D. Russell, and H.E. Justin Sun. With this flight, New Shepard has now flown 75 people to space, including five repeat flyers.

ICEYE expands SAR imaging with "Scan Wide" mode. ICEYE has introduced its new "Scan Wide" mode, capturing up to 60,000km² in a single scene. The capability strengthens maritime monitoring and ISR by enabling wide-area detection of vessel activity or oil spills.



INVESTMENT & FINANCE

Hadrian raises \$260 million for automated factories



Credit: Hadrian

Hadrian has secured **\$260 million in a Series C round** co-led by Founders Fund, Lux Capital and Morgan Stanley. The U.S. start-up builds automated machines to increase and accelerate the delivery of mass-produced parts for the defence and aerospace industry, and offers a “factory as a service” model for companies requiring dedicated capacity. Hadrian has also launched its **Atlas programme**, specifically targeting the space industry, to

streamline and help navigate the sector’s supply chains. The capital will go towards diversification of product offerings, such as welding, casting, and additive processes machines, the building of a new factory in Arizona, and the creation of divisions for the maritime and ammunition sectors.

Aerospacelab raises €94 million for satellite manufacturing

Aerospacelab has secured **€94 million in a Series B extension** consisting of €56 million in private capital and **€38 million from the EIB**. The Belgian start-up manufactures micro-satellites in an “scalable” offering, designed to answer constellation needs, and offers subsystems like on-board computers and switches. Aerospacelab has directed the initial Series B tranche towards its “Megafactory”, planned to open in 2026 and to enable the manufacturing of up to 500 satellites by 2027. This extension will go towards enhanced product readiness and vertical integration of key subsystems manufacturing. Notably, the funding round comes at a time when Airbus D&S and Aerospacelab are competing for the role of satellite prime contractor for the IRIS2 constellation.

Axelspace raises €46 million through IPO on the Tokyo Stock Exchange

Axelspace Holdings has conducted its **IPO on the Tokyo Stock Exchange**, selling 23 million shares at JP¥375 per share, raising **JP¥ 7.9 billion** (approx. €46 million) in the process. The stock of the Japanese company started trading at JP¥751 and closed at JP¥674, closing the day with a **market capitalisation of JP¥ 43.1 billion (approx. €250 million)**. Axelspace designs, builds, and operates microsatellites, offering a full-service platform – AxelLiner - for client space missions, and delivers Earth-observation data via its own constellation – AxelGlobe – serving industries like agriculture, disaster monitoring, and environmental management. The IPO will fund the launch of additional EO microsatellites.

Rocket Lab closes \$275 million acquisition of Geost

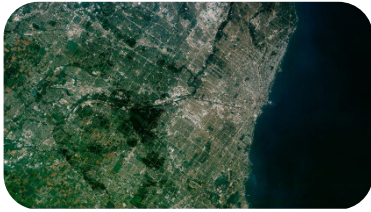
Rocket Lab has closed its **\$275 million acquisition of Geost**, with \$125 million in cash, \$100 million worth of Rocket Lab shares, and a potential \$50 million earnout tied to revenue targets. Geost develops electro-optical and infrared systems for defence missions, enabling missile warning and tracking, intelligence, surveillance and reconnaissance. The acquisition will boost Rocket Lab portfolio of capabilities and strengthen its position for the Golden Dome and Proliferated Warfighter Space Architecture programmes.



Credit: Rocket Lab



EarthDaily Analytics secures \$60 million for geospatial analytics



Credit: EarthDaily Analytics

EarthDaily has secured a **\$60 million loan from asset manager Trinity Capital**. The Canadian start-up develops AI-enhanced EO data and analytics solutions, and has plans for an **Earth Observation constellation** comprised of 10 satellites by 2026. The first satellite, manufactured by Loft Orbital and planned for a 7–10-year longevity, was already launched in June 2025. The investment will be used to “optimise” EarthDaily’s capital structure and support the deployment of its constellation.

Emosat raises over €50 million for ground infrastructure

Emosat (Aerospace Yuxing) has secured **CN¥430 million (approx. €51.4 million) in a Series C+ round**. The Chinese start-up specialises in providing satellite ground segment services, operating a global network of satellite ground stations. Emosat seeks to expand the construction of ground stations abroad. The company will leverage the funding to achieve this objective, as well as increase R&D efforts and strengthen mass production of key technologies.

Voyager closes the acquisition of ElectroMagnetic Systems

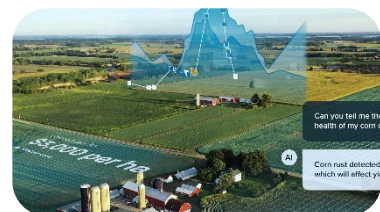
Voyager has acquired ElectroMagnetic Systems for an undisclosed amount. ElectroMagnetic Systems specialises in machine learning-enhanced software enabling automated target recognition and intelligence analytics for space-based radar systems. With the acquisition Voyager aims to strengthen its positioning towards defence priorities, augmenting their offering in the company’s Intelligence, Surveillance and Reconnaissance division.

Platinum Equity to acquire in-flight connectivity company Anuvu

Private equity firm Platinum Equity has signed a definitive agreement to acquire Anuvu for an undisclosed amount, with the transaction expected to close by the end of the year and subject to customary conditions. Anuvu provides satellite-based connectivity and digital media services primarily for in the aviation and cruise markets. The company, formerly Global Eagle, went public in 2011 but was delisted following bankruptcy in 2020 and acquisition by the firm’s first-lien investors a year later. The acquisition will enable Anuvu to accelerate growth by leveraging its customer base, technology, and global footprint while expanding into adjacent markets.

Xoople secures a €22 million expansion for AI-ready EO datasets

Xoople has announced a **€22 million funding round**, with investors remaining undisclosed. The Spanish start-up develops a platform, EarthAI, generating machine-ready EO datasets enabling easier pattern detection and forecasting by customers across various industries. Notably, Xoople partners with Microsoft to leverage Azur in processing customers’ data demand. The capital expansion will drive further product innovation.



Credit: Xoople



ICEYE secures €9.4 million from Poland's National Development Bank



Credit: ICEYE

ICEYE has **secured PLN 40 million (approx. €9.4 million) from Vinci S.A.**, the investment vehicle of Bank Gospodarstwa Krajowego, the Polish National Development Bank. The funding was disbursed under the 2025-2030 strategy, which is officially tasked with supporting "innovative Polish technologies". ICEYE opened a subsidiary in Warsaw in 2017, currently hosting the Satellite Operations Centre supporting its constellation, and has

signed in May 2025 **a contract with the Polish MoD for an initial batch of three SAR satellites**. The funding will likely support ICEYE's expanding presence in the country.

SpinLaunch raises \$18 million for LEO constellation

SpinLaunch has secured **\$18 million in an investment round** led by ATW Partners. The U.S. start-up, which designs a kinetic launch system, has announced in April 2025 the development of Meridian Space, a 280 satellite LEO broadband constellation. The manufacturing of the satellites was awarded to Nanoavionics, following a \$12 million investment from parent company Kongsberg Defence & Aerospace. SpinLaunch will use the capital for accelerated go-to-market efforts to meet customer demand in the second half of 2026.

SkyFi secures \$14.2 million for EO imagery platform

SkyFi has secured **\$14.2 million in a Series A round** led by **Contrarian Thinking Capital**, according to SEC Filings. SKyFi develops a platform aggregating EO data and enabling an easier retrieval of imagery and analytics. The company has tied partnerships with EO operators such as Maxar, Umbra Space, Albedo and Wyvern and allows for satellite tasking if the desired image is not available in SkyFi's database. Use of the funding wasn't disclosed.

Space Kinetic secures \$12 million for high-speed payload deployment

Space Kinetic has raised **\$12 million in a Seed round** led by Balerion Space Ventures. The U.S. start-up has patented a **propellant-free electromechanical system** allowing rapid deployment of customisable payloads. Space Kinetic, targeting the space defence market, seeks to deploy payloads focused on upholding space superiority and targeted at missile defence. The fresh capital will go towards **R&D and strengthening of operational capabilities and market positioning**.

Pale Blue raises approx. \$10 million for water propulsion

Pale Blue has secured approximately **JP¥1.5 billion (approx. \$10 million) in a Series C round** led by Mitsubishi Electric, which will see both companies deepen their collaboration in the space sector. The Japanese start-up develops water-based propulsion system: its first product, Resistojet, can power micro-satellites and has already secured several customers, the company says. **Pale Blue plans to demonstrate a more powerful thruster**, for spacecraft of up to 700 kgs, in 2027. The funding will enable to meet the demand through enhanced production and quality control systems.



Credit: Pale Blue



In other news

Orbital Operations secures \$8.8 million in a Seed round led by Initialized Capital: The U.S. start-up develops a spacecraft, Astraeus, designed to loiter in orbit and offer long-duration in-space operations. Designed as a “counterspace weapon”, Astraeus will enable the DoD to rapidly answer to adversarial threatening manoeuvres through high-thrust capacities. Funding will serve in growing the team and expanding facilities to demonstrate its technology.

Ursa Space Systems announces undisclosed strategic investment from Sumitomo Corporation: the U.S. company provides geospatial data and analytics through AI-enhanced software fusing satellite sources. The capital from Sumitomo Corporation, a Japanese integrated trading and investment conglomerate, will enable further R&D, capabilities growth, and expansion into Asia.

Manastu Space secures \$3 million from Capital-A in a Series A extension: the Indian start-up develops green propulsion and debris collision avoidance systems. The capital extension will be directed towards go-to-market efforts for existing product offerings and development of in-orbit servicing technologies like refuelling, deorbiting, and mission life extension.

Aurora Starcom secures an undisclosed amount in a Series A3 round led by CBD Venture: the Chinese company manufactures laser communication terminals and pursues the development of its constellation to enable in-orbit demonstration of its technology. The capital will serve in mass-manufacturing of Aurora's terminals and accelerate R&D efforts.

EDGX raises €2.3 million in a Seed round co-led by imer.istart future fund and PMV: the Belgian start-up builds an AI-enhanced high-performance data unit, the Sterna Computer, dedicated to running in-orbit processing. The company will launch a demonstrator in February 2026 and will direct the funding towards scaling-up of operations.

Orbital Paradigm secures €1.5 million in a pre-Seed round: the Spanish company develops reusable capsules able to return sensitive payloads back to Earth. The first prototype, “KID”, will be launched by the end of 2025. The investment will serve to continue KID prototype development, iterate on its design, and prepare for a second mission in late 2026.

Orbital Matter raises €1 million in a Seed round led by Early Game Ventures: the Polish start-up seeks to manufacture structures in space through spacecraft equipped with 3D-printing devices. Orbital Matter, advancing a 70% reduction of launch weight through its technology, conducted a demonstration in space-like conditions in 2023. The capital will be used for an in-orbit demonstration and product operationalisation.

Itility Group acquires majority stake in Sensor for an undisclosed amount: Sensor leverages satellite-based InSAR to map and offer visualisation of land movements. The acquisition will enable Itility Group, a software and data solutions provider operating across the manufacturing, health, energy and AgriTech sectors, to reinforce its Earth Observation Hub and scale its downstream processing capacities. Both companies are based in the Netherlands.

Pole Star acquires Clearwater Dynamics for an undisclosed amount: Pole Star, a UK company operating in maritime intelligence and domain awareness, will leverage Clearwater's specialising in real-time vessel monitoring and insurance. The acquisition will equip Pole Star with an integrated offering, marking its entry into the insurance sector and enhancing its DOMAIN platform with Clearwater's data sources.

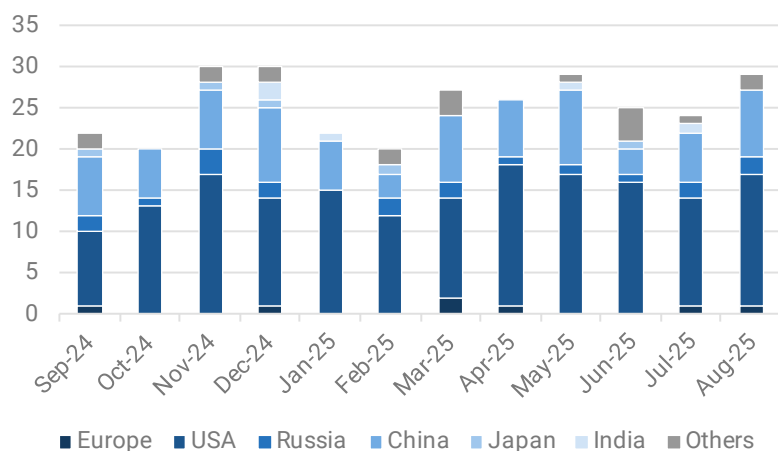


LAUNCHES & SATELLITES

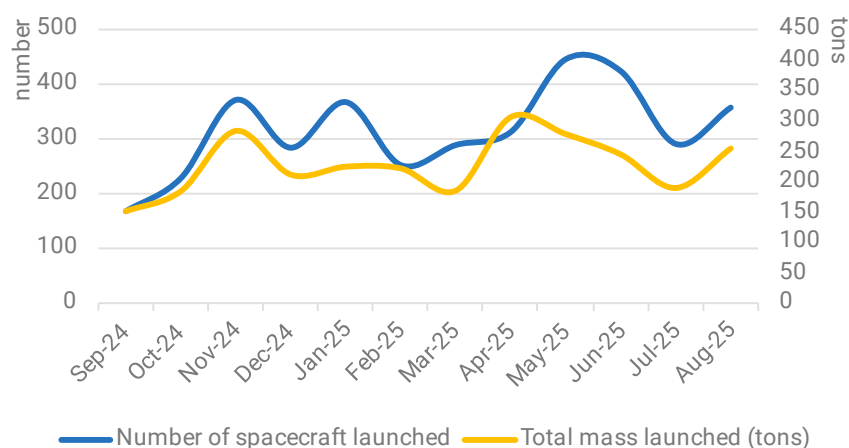
Global space activity statistics

August 2025	Europe	USA	China	Russia	Other	Total
Number of launches	1	16	8	2	2	29
Number of spacecraft launched	1	287	57	5	6	356
Mass launched (in kg)	4040	201 279	38 530	9466	294	253 609

Launch activity over the year



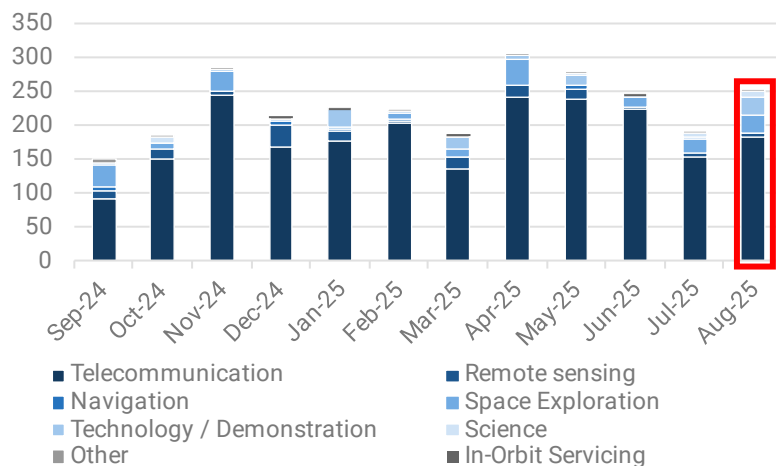
Evolution of the number of launches per launch country



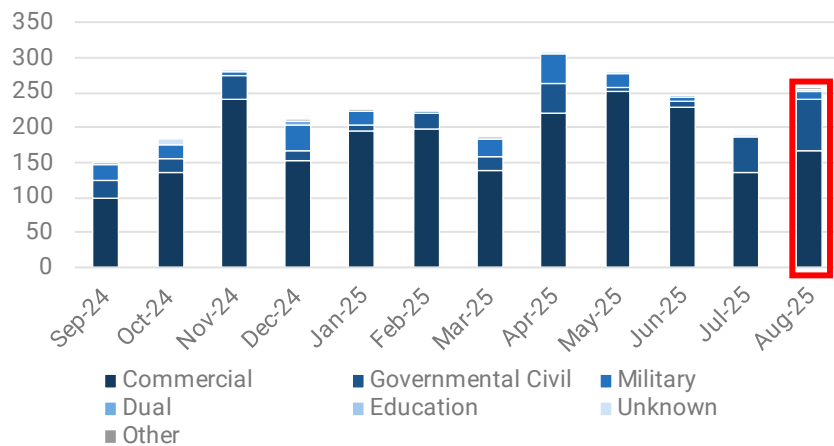
Evolution of launch activity over the year 2024-2025



Satellite missions and markets



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



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

August 2025	Telecom	Remote sensing	Nav.	Exploration	Science	Tech/ Dem.	Other & Unknown
Europe		4685					
USA	148 900	485		26 850		22 650	1503
China	32 600	500	1430			4000	
Russia					6266		3200
India		180				60	
Japan		103					3
Other	74					1	121

Total mass (kg) launched by mission and customer country

August 2025	Commercial	Governmental Civil	Military	Dual	Education	Other & Unknown
Europe		4040		645		
USA	165 385	26 850	7650			503
China	1530	36 700	300			
Russia		6266	3200			
India	240					
Japan	100				4	3
Other	74				1	120

Total mass (kg) launched by market and customer country

ESPI Insights Editorial Team

Editorial Management	Alberto Rueda Carazo
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