

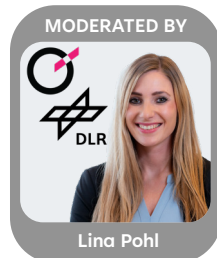
ESA CM25 AND BEYOND

GERMANY'S ROLE IN SPACE IN EUROPE



Organised
by ESPI, in
cooperation
with the
German Space
Agency at DLR

SPACE AND MEDIA ROUNDTABLE



PARTNER

| BertelsmannStiftung



KEY TAKEAWAYS

In March 2025, ESPI initiated the [1st edition of the Space Media Roundtable](#) “The New Bundestag – Germany’s Role in Space in Europe” shortly after the German elections. The first edition focused on **political will, power and sovereignty**. It underlined the need for Europe to **scale up investments** to become a space power. It was hopeful on **Germany’s new momentum to step up and lead in Europe in space**, next to France and other European and international partners. It called for increasing awareness of the relevance of **space for defence and other policy domains and industry sectors** as well as for the wider economy, and the **need to connect space and defence in civil-commercial-military cooperation and integration**.

The **2nd ESPI Space Media Roundtable** on Germany’s role in Europe in space, took place in November, prior to the ESA Ministerial at Council Level (ESA CM25) under the German Presidency.

The **period between the two Round Tables editions has brought unprecedented change**, and the hope to see Germany set-up have been more than fulfilled by the announcement of a new €35B space defence budget and the release of the first-ever national space security strategy. Over the past months, the **political will in Germany and Europe** to leverage space with other policy priorities, has **reached a new dimension**, spurring unprecedented public funding and attracting private investment dynamics in Germany and Europe – significantly driven by defence. Both, in defence and civil space, cooperation with traditional (Canada, Japan, South Korea, ...) and new partners (India, Africa, UAE, ...) has moved centre stage.





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The second edition of the media roundtable **reflects on this new level of political will and budgets, on the (re-)convergence between space and defence, and on increased international cooperation** - focusing on key questions, needs and challenges of today: maximising the **policy impact of space** and developing **Germany's leading role and posture in Europe**, positioning **Europe as a Space Power**, using the new budget **efficiently in the challenging timeline**, driving capability development & boosting the German and European space industry – and **advocating for a European and international policy debate for space hosted in Berlin**.

Upcoming editions of the space media roundtable will take up on these milestones and focus on their **implementation**, e.g., of ESA CM25 budget and programme decisions, the new German Space Security Strategy and the dedicated €35B space defence budget.

1 Europe as a Space Power

Increased **political will and awareness are spurring public and private investments in space** in Europe – **unlocking Europe's potential to become a Space Power**. With **defence as a driver of urgent needs**, space defence investments have globally overtaken civil space budgets since 2022. Over recent years this has contributed to a widening of the gap between Europe and the US and China. As Europe now starts to scale up, **a space policy debate is needed to further promote the European space policy agenda**, linking space to other policy domains and priorities.

Increased and **diversified international cooperation** with existing partners and new partners is crucial. While honoring existing cooperation where possible, Europe needs to also **rethink cooperation with the US, and diversify to decrease dependencies**, e.g. increasing cooperation with traditional (Canada, Japan, South Korea) and **new partners**, as India, UAE, and Africa.

2 German leadership in Europe in space

With the new government, **space has made a quantum leap in Germany's political agenda and is now "Chefsache"**: a first ever space ministry in Germany, a first-ever space security strategy, the new High-Tech Agenda, a ground-breaking €35B space defence budget (at par with the ESA CM25 budget) and increased political relevance for ILA 2026 in Berlin. There is visible **dedication and action** by the government, the space ministry, and the defence ministry for space, adding **new weight and responsibility and moving Germany into a leading role in Europe**. In this role, Germany is required and expected to lead, to provide direction, together with partners, in particular France but also other nations like Italy.

While space defence is driving ambitions, Germany should not neglect civil space: Germany's high-tech agenda reflects the new German research, technology & space ministry's approach of embedding space more broadly. It is important to think, cooperate and use synergies of civil-military and to enhance cooperation between science/research and industry. The inspirational dimension of space needs to be supported.





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3 Space as an enabler for security & defence

Space is a strategic enabler for multi-domain operations and a warfighting domain - therefore, the development of defensive and offensive capabilities is crucial. The European Space Shield initiative is as a flagship project in the European Defence Roadmap. Europe needs flexibility, responsiveness, resilience, redundancy, and deterrence to achieve strategic autonomy and sovereignty. Furthermore, interoperability and different degrees of command & control are crucial when developing and operating in a federation of national assets and those of partners and at European level.

Germany's space security strategy and architecture will provide a clear direction for an effective and efficient budget use, including planned development of defensive and offensive capabilities, including in missile detection and defence, satcom, signal and radar intelligence, and active counterspace against jamming and spoofing.

4 Defence as a driver for investments, industry (and innovation?)

The political will to act and implement space solutions for defence is reflected in Germany's new €35B space defence budget and the first-ever German space security strategy. The new budget is a game changer, shifting Germany to lead space (defence) budgets in Europe, and is a historical turning point in Germany from "time but no money" to now "money but no time".

Procurement processes need to be restructured and modernized, e.g. including rolling procurement, for speed and agility. The space defence budget with the state as an anchor customer can and should be a flying wheel of commercialisation. Industry states that it is ready to deliver yet it will also be a challenge for governmental actors to become a better customer, allow and incentivize integration of commercial solutions and stimulate innovation with actors and mechanisms such as the Bundeswehr University, SPRIND and the Space Innovation Hub.

5 Shifting the industrial landscape in Europe

Unlike some countries, defined by leading major industrial actors, the industrial strength of Germany's industrial eco-system is defined by its diversity - established next to a growing new space sector and SMEs. Industry-driven innovation and business agility are key. Sovereignty needs competitiveness and competitiveness needs sovereignty. „Make and buy European“ should be a Leitmotiv.

Further, ensuring the workforce and talent of tomorrow remains a challenge, with the need to attract talent from non-space sectors (e.g., AI, defence, automotive) - the automotive crisis provides an opportunity for the space sector.

