

Director's Perspective

**ESA CM25:
CONFIRMING THE VALUE OF INTERGOVERNMENTAL
COOPERATION IN SPACE ACROSS EUROPE**

December 2025

The ESA Council at Ministerial Level (CM25) in Bremen marked a turning point for Europe's future in space. It sent a clear signal that ESA Member States are ready to redefine Europe's role, setting a new posture and collective leadership on the global stage by entrusting ESA to also support Europe's security and defence ambitions.

This historic shift cannot be overestimated and can be expected to persist and grow.

This commitment is remarkable: a 32% increase in ESA's budget to €22.3 billion at a time of increasing national priorities and investments in space. It includes a historic science boost of 3.5% per year beyond inflation and strong investments in resilience, connectivity and over-subscription of space transportation. Countries such as Spain, France, Italy, Poland, Belgium and

Portugal demonstrated exceptional ambition, reinforcing Europe's ability to act collectively despite complexity. Germany set the tone before CM25 with unprecedented political momentum, including a €35B space defence budget announced by the Ministry of Defence.

In a period of tangible risk in several member states of turning towards a "national first" policy, CM25 shows that there is a willingness to come together to unite efforts and to use the mechanisms of ESA's optional programmes to respond with resilience to global challenges also on the European level.

CM25 delivered on five of the seven critical signals identified by ESPI ahead of the meeting: security and defence as a driving priority, the resilience of the European fabric despite its complexity, readiness to invest in disruptive approaches and increase

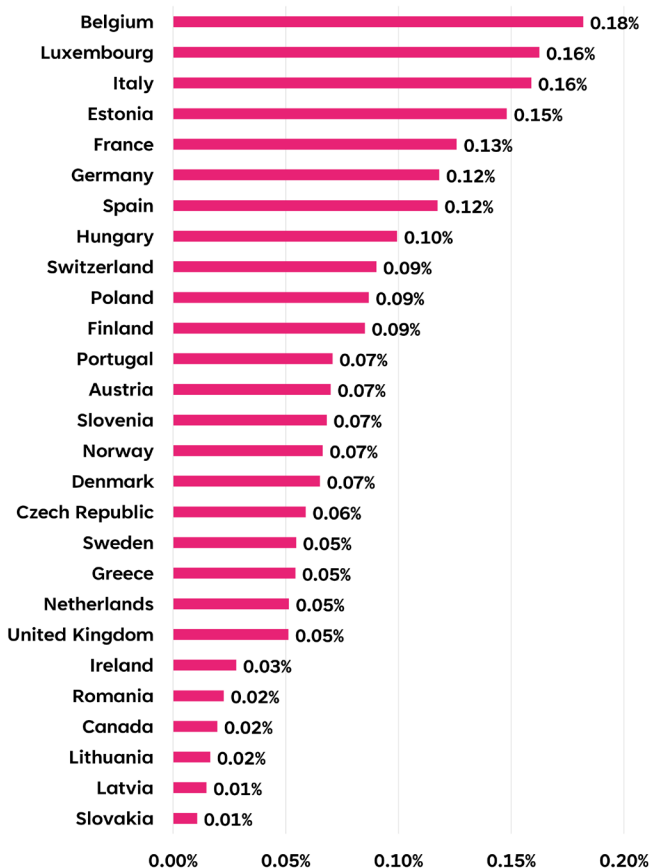


Figure 1: CM25 subscriptions as a percentage of 2024 GDP



Figure 2: CM25 subscriptions per capita

The numbers in both visuals are not normalised and refer to the full multi-annual commitment

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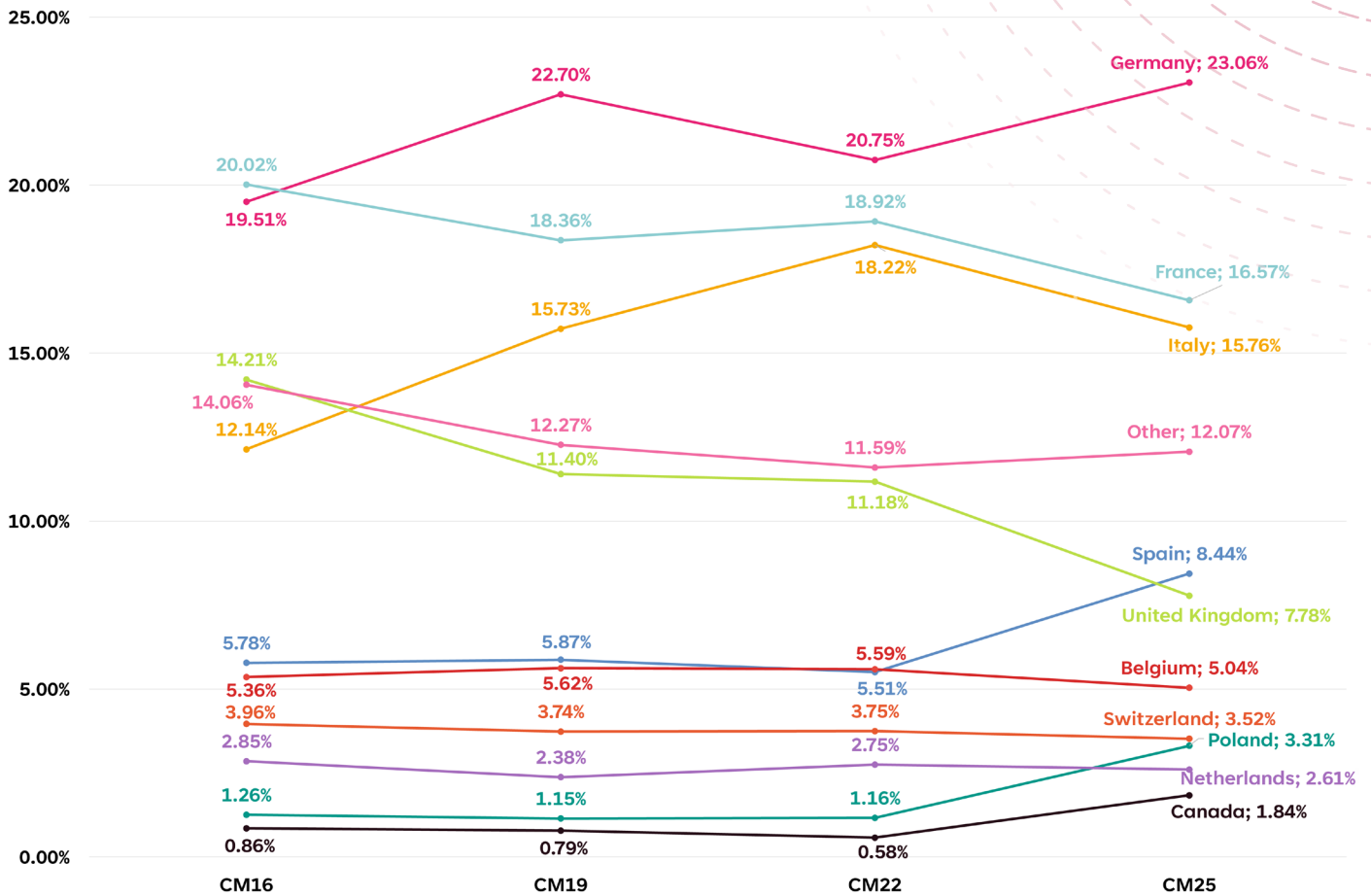


Figure 3: Historic and current percentage of ESA budget coming from CM25's Top 10 highest contributors and other countries

funding for technology and innovation, and the strengthening of Europe's international ambitions, with Canada setting an exceptional example.

These commitments are historic and demonstrate what European cooperation can achieve when urgency of action and strategic necessity meets political will.

More work will be required to also boost science and exploration once uncertainties with ESA's primary science and exploration partner, NASA, can be resolved.

Although we can see clear positive trend in investments in next generation and cutting-edge technologies, as well as the attraction of more private capital, both need to be scaled up further, more significantly. CM25 made the point that competitiveness and sovereignty need each other; that one cannot be sustainable without

the other and that ESA is critical part of a European answer to this endeavor.

Looking beyond CM25, the flexibility introduced through ERS subscriptions remaining open into 2026 can be expected to result in further growth. It offers a potential model for more dynamic programme commitments, particularly important to accommodate decisions at national level, for example on security and defence and of international partners, such as on exploration. It may allow countries like the UK to rediscover the power of intergovernmental mechanisms and reassess its level of commitment to Europe. It may become a timely complement to the nominal milestones of Europe's space programmes at ESA and the EU.

Yours sincerely,

Hermann Ludwig Moeller
Director of ESPI

