

# PORTUGUESE SPACE ECOSYSTEM

## → Highlights of the Semester – Winter Report

The second semester of 2025 consolidated the growth trajectory of the national space sector, with a decisive increase in public investment. The reprogramming of the Recovery and Resilience Plan (PRR) expanded funding for the New Space Portugal Agenda, creating conditions to accelerate technological development, industrial capacity, and satellite-based services, with a multiplier effect on the ecosystem, strengthening the position of Defence in the sector. Parallel to this, Portugal consolidated its position with ESA and made progress in terms of regulation and infrastructure, namely with the licensing of the first spaceport.

### INDICATORS

**204,8 M€****22,3 mil M€****1****+2**

Portuguese subscription to  
ESA (CM25) for 2026–2030

Record budget approved  
for ESA (CM25)

Licensing of infrastructure for  
the Santa Maria spaceport

Satellites registered  
in Portugal

**200 M€****190 M€****+260**

Public funding for the sector  
in 2025

Space setor revenue  
in 2024

Placements in Aerospace  
Engineering Bachelor's Degrees

**JULY****AUGUST****SEPTEMBER****OCTOBER****NOVEMBER****DECEMBER**

- 1st edition of the UN-Portugal Outer Space Fellowship
- Licensing of EOSSAT-1 (C&C)

- Licensing of infrastructure for the Malbusca Space Port, Santa Maria
- New Space Portugal Agenda reinforced in the PRR

- 4th edition of Astronaut for a Day (Santa Maria)
- National workshop on the EU Space Act

- 6th edition of EuRoC takes place in Constância
- ESA's Biobank, located at GIMM in Portugal, receives first samples

- Portugal's largest investment in the ESA Ministerial Council of 2025
- Agreement with ESA consolidates Santa Maria Technology Centre and Space Rider landing

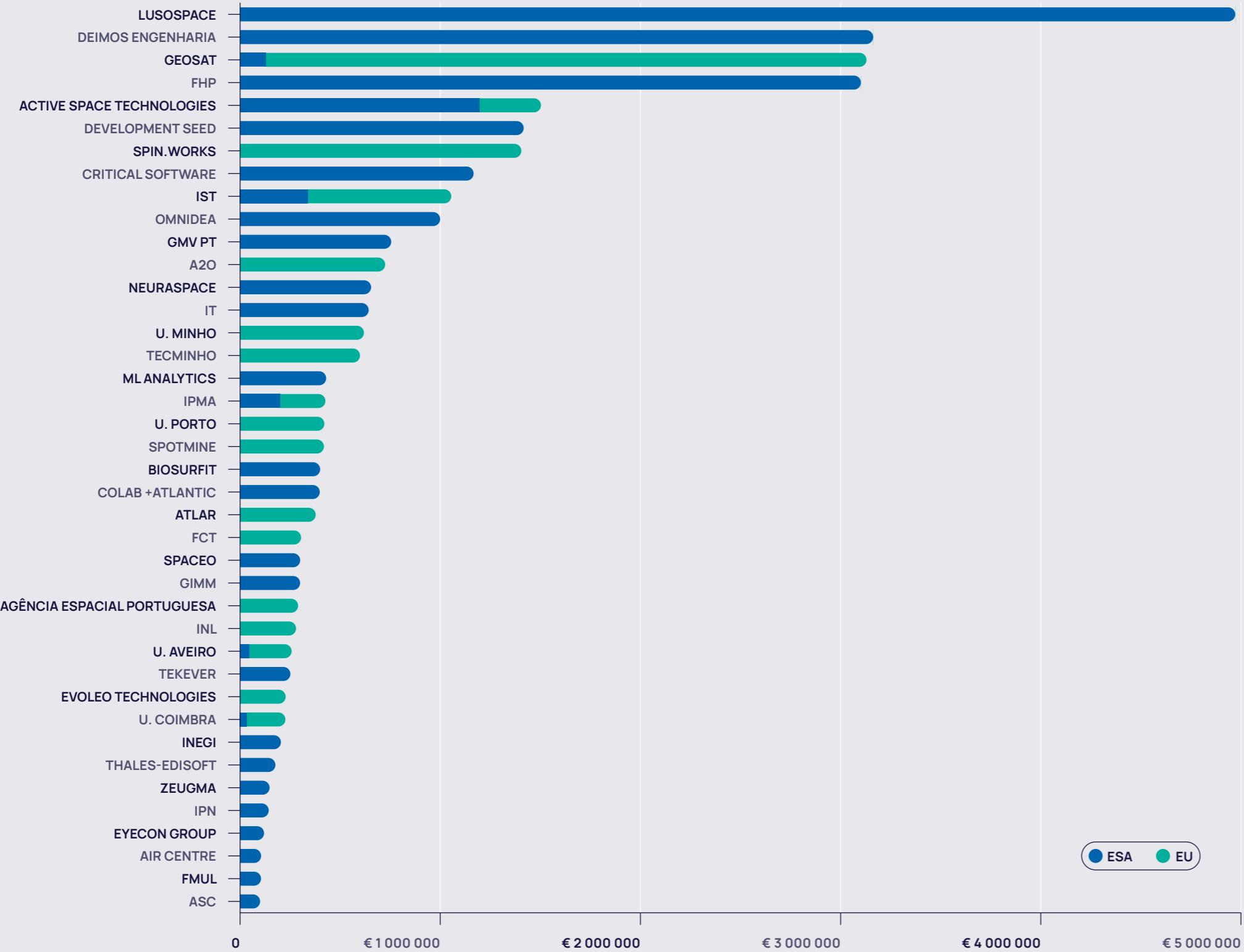
- Launch of two new satellites from the Galileo Constellation by the European Ariane 6 launcher, monitored by the Santa Maria Tracking Station

### HIGHLIGHTED PROJECTS

#### Reprogramming of the PRR's New Space Portugal Agenda

The reprogramming of the Recovery and Resilience Plan increased support for the mobilising of the New Space Portugal Agenda from €137 million to €417 million. The increase accelerates investment in national capacity to develop, integrate, and operate space systems and services, enhancing Defence's contribution and strengthening the sector's value chain and competitiveness. In the PRR, the space sector further includes a second mobilising agenda: AI Fights Space Debris, promoted by Neuraspace.

© DR



Note: ESA contracts (by Q3). Reprogramming of the New Space Portugal Agenda (PRR) is accounted for on the date of the initial contract. Only entities with an accumulated value >€100k.

At the end of 2025, contracts signed by Portuguese entities totalled €23.4M in ESA programmes (with data consolidated as of the third quarter of 2025) and €10.3M in EU initiatives. Among the largest projects are LISA, DPS Copernicus Contributing Missions (Dynamic Purchasing System), and ARRAKIHS.

Portugal's economic return on ESA remained at 102%, reflecting the maturity and competitiveness of the national industry in high-added-value activities within European programmes. Between 2019 and 2025 as a whole, Portuguese participation totalled €122M in industrial contracts.





### First edition of the UN-Portugal Outer Space Fellowship

Between 7 and 11 July, Lisbon hosted the 1st edition of the UN Portugal Outer Space Fellowship, bringing together 20 technical and diplomatic officials from developing countries. The training, promoted by the Portuguese Space Agency with the MFA, the Camões Institute, and the United Nations (UNOOSA and UNITAR), strengthened skills in defining and implementing space strategies and in more qualified participation in space governance, valuing cooperation and sustainable development.

© Portuguese Space Agency



### Open Cosmos acquires Connected and invests 50M€ in Portugal

In July, British company Open Cosmos acquired Connected, a company specialising in satellite-based IoT connectivity. Open Cosmos integrated Connected as a dedicated business unit, accelerating the development of the group's space connectivity capabilities and strengthening Open Cosmos' presence in Portugal. The British company expects investment in Portugal to exceed €50 million over three years, including the opening of a satellite factory in Coimbra.

© UPTEC



### EOSSAT-1 is the sixth satellite licensed in Portugal

On July 22nd, Portugal issued the command-and-control licence for the EOSSAT-1 satellite, owned by EOSSAT, in the context of the State's international responsibilities. Orbiting at approximately 540 kilometres, the mission focuses on Earth Observation activities, with an emphasis on monitoring and supporting smart agriculture management.

© EOS



© AED

### AED's workshop on the ESA Ministerial 2025

On July 21st, AED Cluster Portugal organised a workshop dedicated to preparing for the 2025 European Space Agency (ESA) Ministerial Council, with the participation of the Portuguese Space Agency. The meeting brought together industry, academia, and institutions to align priorities and discuss opportunities in ESA programmes. The agenda included thematic sessions and networking opportunities for partners.



© Portuguese Space Agency

### PNT workshop and opportunities in the ESA NAVISP programme

The Portuguese Space Agency organised a workshop in Lisbon dedicated to Positioning, Navigation, and Timing (PNT) technologies and the opportunities offered by the ESA NAVISP programme, bringing together around 30 entities from industry and academia. From the sea to drones and space, the focus was on applications, resilience challenges (such as jamming and spoofing) and multi-constellation and sensor fusion approaches. The meeting helped to prepare future applications and partnerships.



© DGDefis

### Galileo OSNMA goes into operation

On July 22nd, Portugal issued the command-and-control licence for the EOSSAT-1 satellite, owned by EOSSAT, in the context of the State's international responsibilities. Orbiting at approximately 540 kilometres, the mission focuses on Earth Observation activities, with an emphasis on monitoring and supporting smart agriculture management.



© ASC

### Portugal grants first licence for a spaceport

The first national licence for the operation of a spaceport was granted to the Atlantic Spaceport Consortium for the installation of a launch centre in Malbusca, on the island of Santa Maria (Azores). Valid for five years, the licence covers the operation of the infrastructure but not launches, which require separate licensing and assessment. The process, the responsibility of ANACOM with technical support from the Portuguese Space Agency, included consultation with all relevant national and regional authorities.



© DR



© Portuguese Space Agency

### Agency promotes Portuguese space ecosystem in Japan

In August, the Portuguese space ecosystem was in the spotlight in Japan, with an agenda that combined diplomacy and opportunity creation. The Space Dive exhibition was on display at the Portugal Pavilion at Expo 2025 Osaka, as part of an agenda that also included attending the Portugal Economic Forum at the Embassy in Tokyo, with institutional and business contacts, including JAXA.



© DR



© DR

### Second cycle of EO4 Municipalities assessments completed

Seven companies submitted projects to apply Earth Observation data to the needs of Portuguese municipalities in the second cycle of evaluations of the ESA InCubed – EO for Municipalities national competition. The competition received 12 proposals, and the selected projects, which reflected the needs identified in the Earth Observation for Municipalities workshop cycle promoted by the Portuguese Space Agency between 2023 and 2024, are currently being negotiated with the European Space Agency.



© Portuguese Space Agency

### Copernicus training in Cape Verde strengthens agricultural monitoring

Between August 4th and 8th, a face-to-face training course on remote sensing and Copernicus services (CLMS) was held in Cape Verde, with 25 technicians from the Ministry of Agriculture and Environment and public institutes in attendance. The action, carried out in partnership with the University of Évora, was part of the Copernicus User Uptake in Africa programme under the FPCUP. It combined practical training in QGIS and SNAP with case studies on calculating vegetation indices, supporting agricultural campaign monitoring, and crop yield forecasting.

### EGNOS system upgrade with GEO-3 entry into operation

Following a testing phase, the EGNOS GEO-3 payload aboard Eutelsat 5 West B has become operational. The system upgrade has enhanced the robustness and reliability of European satellite navigation services and ensured continuity during the transition between the system's geostationary satellites.

### EU Space Act: contributions to a national position

On September 12th, a session dedicated to the EU Space Act brought together industry, academia, and public entities to discuss the proposed European regulation for the safety, resilience, and sustainability of space activities. Organised by the Portuguese Space Agency, the meeting addressed technical requirements, management models, and sector impacts, and gathered contributions for a national position to be presented during the public consultation in Brussels.



© Portuguese Space Agency

### Santa Maria welcomes the 15th session of the ECSF

The headquarters of the Portuguese Space Agency, in the Azores, welcomed the 15th session of the European Commercial Spaceport Forum (ECSF), in the year that Portugal assumed the presidency of the network. In addition to sharing perspectives on national programmes and current sector issues, participants visited the Spaceport and learned about plans for the future Space Technology Centre and the Malbusca Launch Centre.



© NASA

### Columbus module reaches 100,000 orbits

The European module Columbus, which has been on the International Space Station since 2008, reached the milestone of 100,000 orbits on September 12th. Since the start of operations, it has supported more than 250 experiments, ranging from 3D metal printing and food production system studies to bone mass loss research. Portugal is participating with the GLOSS experiment, installed on Bartolomeo, Columbus' external platform, to test how crystals used in high-energy particle sensors for astronomy behave in the space environment and under radiation.



© Portuguese Space Agency

### Astronaut for a Day debuts in Santa Maria

For the first time, the final phase of Astronaut for a Day took place in Santa Maria, reinforcing the connection between the initiative and the Portuguese Space Agency and the island and local community. The initiative brought together the 30 finalists for four days of training activities and group dynamics, bringing young people from all over the country closer to the space infrastructure that is being built and consolidated in Santa Maria.



© Portuguese Space Agency

### Sixth edition of EuRoC takes place in Constância

Between October 9th and 15th, Constância hosted the sixth edition of the European Rocketry Challenge – EuRoC, with the participation of 28 teams from 16 countries, totalling around 700 students. Similar to 2023, the paddock was set up at the Constância Municipal Sports Pavilion, and the launches took place at the Santa Margarida Military Camp, with the support of the Army and the Municipality of Constância. The Austrian team Aerospace Team Graz won the EuRoC Award.



© ESA - S.Corvaja

### Europe marks 30 years of satellite navigation

On September 2nd, ESTEC in the Netherlands opened its doors to celebrate three decades of European satellite navigation. The initiative highlighted the evolution of the EGNOS and Galileo systems, bringing together the European Commission, EUSPA, Eurocontrol, Member States, and industry. An exhibition and a show celebrated milestones and previewed the sector's next steps.



© CMC

### Guimarães creates Space Hub for the New Space Economy

In October, Guimarães inaugurated the Guimarães Space Hub (GSH) to bring academia and industry closer together and establish the municipality as a hub for the so-called New Space. The hub will focus on technologies and applications that impact areas such as sustainability, mobility, artificial intelligence, and defence. The initiative is the result of a partnership between the Municipality of Guimarães, the University of Minho, and CEiiA.



© GIMM; ESA; arquivo Agência

### ESA's Biobank receives first samples

In October, ESA's Biobank at GIMM in Lisbon received the first samples from the Vivaldi III study, marking the operational start of the infrastructure in Portugal. The first shipment included 1,422 samples, out of a total of 4,380 collected in this dry immersion analogue study, conducted by ESA and MEDES to simulate the effects of microgravity on Earth.



© European Union

### FPCUP: seven years of strengthening the use of Copernicus

The Caroline Herschel Framework Partnership Agreement (FPCUP), launched in 2018 to accelerate the use of the Copernicus programme data, has come to an end. In seven years, it has mobilised 50 partners from 23 countries and promoted more than 220 actions, including training, pilot projects, and studies on user needs. This work has helped consolidate user networks and transform Copernicus data into practical solutions across the environment, water, agriculture, and civil protection.



© New Space Alliances

### New Space Portugal Agenda creates association

Creation of New Space Alliances, an association dedicated to promoting the sustainable development of the space sector in Europe and worldwide. The structure aims to reinforce the ambition for strategic autonomy, with a focus on security, defence, and sustainability, and seeks to boost partnerships and initiatives that increase the economic and social impact of space technologies on citizens.



© NASA

### EANA takes place in Portugal for the first time

The annual conference of the European Astrobiology Network Association (EANA) was held for the first time in Portugal, at the Instituto Superior Técnico (IST), from October 21st to 24th, 2025. The meeting brought together around 200 participants from the European astrobiology community to share results and discuss challenges related to the origin, evolution, and habitability of the universe.



© AgData

### European AgData partnership launched

The European partnership "Agriculture of Data" (AgData) was launched under Horizon Europe to accelerate the digital transition of agriculture. The initiative brings together national authorities, funders, and research centres to focus on access to and use of environmental and Earth Observation data. The programme is expected to run for seven years and has a budget of €300 million, co-funded by the EU.



© ESA - Ph. Servent

### Portugal secures record subscription to ESA (CM25)

At the ESA Ministerial Council in Bremen in 2025 (CM25), Portugal confirmed a subscription of €204.8M for 2026–2030, an increase of 51% compared to 2022. The commitment involved the government areas of Science, Defence, Economy, Infrastructure, and Environment, with the contribution of the Regional Government of the Azores. The Ministerial also approved ESA's largest ever budget (€22.3B), creating conditions to strengthen Portuguese participation in strategic programmes and convert investment into contracts, consortia, and national capacity.



© ESA - S. Corvaja

## Agreement with ESA consolidates Santa Maria Technology Centre

In the context of CM25, Portugal and ESA signed a cooperation agreement that consolidates the development of the future Santa Maria Space Technology Centre and the Space Rider landing and post-landing processing infrastructure. With a total investment of €15 million, the infrastructure will be developed with national funding through ESA and a contribution from the Regional Government of the Azores.



© Indico

## Indico launches fund with vertical focus on space technology

O Indico VC Fund III foi lançado com 125 milhões de euros para investir em tecnologias criadas em Portugal, Espanha e Itália. A estratégia abrange rondas entre seed e Série B e identifica a tecnologia espacial entre as áreas prioritárias, a par da IA, deep tech e tecnologia oceânica. O fundo arrancou com um compromisso inicial de 30 milhões de euros do Fundo Europeu de Investimento.

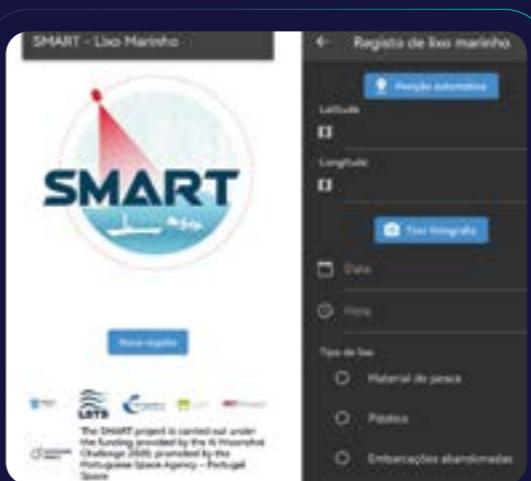


© DR

## Portugal celebrates 25 years with ESA

It has been 25 years since Portugal joined the European Space Agency. The agreement was signed on December 15th, 1999, and Portugal became a Member State on November 14th, 2000. This milestone highlights the sector's scientific, technological, and industrial growth and the consolidation of the national ecosystem over recent decades.

SMART project completes AI Moonshot Challenge



© NEURASAT

## SMART project completes AI Moonshot Challenge

The SMART project, winner of the Moonshot Challenge, concluded with the delivery of its final report on November 21st. Launched in 2019 by the Portuguese Space Agency, in partnership with FCT, Unbabel, ESA, and ANI, the challenge supported the development of artificial intelligence solutions applied to satellite imagery. The SMART project focused on the detection and monitoring of marine litter, creating decision support tools with environmental impact.



© NEURONAUT

## PROSSE 2025 funds two microgravity projects

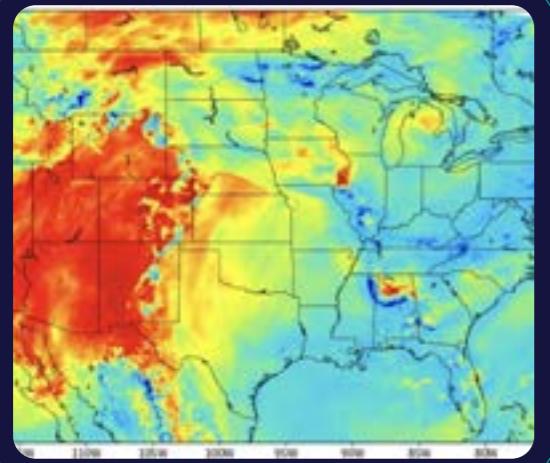
The NEURONAUT project, from the Institute for Systems and Robotics (ISR) at Técnico, and the U-SANS project, from INEGI, won the 2025 edition of PROSSE (PROdex for Science in Space Exploration), an initiative by the Portuguese Space Agency dedicated to science in space exploration. Each project will receive €50,000. The edition had 11 applications, evaluated by international experts, and included technical and financial feasibility checks by ESA's PRODEX team.



© Lusospace

## iATON constellation licensed in Portugal

In December, Portugal licensed the operation of the iATON constellation, led by LusoSpace, whose first satellite, PoSAT-2, was launched earlier this year. The constellation, comprising 12 satellites, aims to provide VHF Data Exchange System (VDES) and Aeronautical Information Services (AIS) to support global maritime navigation. Licensing is the responsibility of ANACOM, as the Space Authority.



© DR

### Weather Stream licenses satellite in Portugal

The subsidiary of the American company Weather Stream has obtained an operating licence for the GEMS02-AMETHYST satellite. The five-year licence covers a 6U cubesat integrated by GomSpace, equipped with a second-generation passive microwave sensor. The mission enables monitoring of temperature and humidity profiles over a range of 1,600 kilometres at resolutions of 16 to 50 km.



© Portuguese Space Agency



© ESA - P. Carril

### Galileo system reinforced with two new satellites

Two new satellites, SAT 33 and SAT 34, were launched on December 17th, as part of mission VA266 aboard an Ariane 6 from French Guiana. It was the programme's 14th operational launch and the first Galileo mission using the new European launcher, reinforcing the redundancy, robustness, and continuity of the service. The programme includes Portuguese contributions to the operation, testing, and development of the system.



© ESA



© Portuguese Space Agency

### Critical Design Review marks a decisive phase for Cubesat Portugal

At the end of the year, the seven CubeSat Portugal teams entered the Critical Design Review (CDR) phase, a decisive milestone in the competition. After months of work, each project was evaluated for its maturity and key engineering decisions in a particularly demanding stage. Following the evaluation, the TejoOne, Porto Space Team, LISAT, and MAST teams were approved. The continuation of the AegisSat, F.A.D.O, and OrbitX teams still depends on the completion of certain tasks.



© Lusospace

### Portugal launches second edition of international space training programme

In March 2026, Lisbon will host the 2nd edition of the UN-Portugal Outer Space Fellowship, promoted by the Portuguese Space Agency, jointly with the Ministry of Foreign Affairs, the Camões Institute, and UNOOSA. The programme will once again support the training of technicians from developing countries in the definition and implementation of space strategies. On March 25th, it will host an International Conference on Space Policy and Diplomacy, in partnership with ISCSP, open to external participants.

### New Earth Observation missions

During the second semester, new European Earth Observation missions were launched, aimed at monitoring the atmosphere with MTG-S1/Sentinel-4 (July 1st) and Metop-SGA1/Sentinel-5 (August 12th); reinforcing radar with Sentinel-1D (November 4th) and ocean altimetry with Sentinel-6B (November 17th). On November 28th, there was a joint launch with two hydroGNSS (soil moisture) satellites, eight Eaglet/IRIDE (imaging), two ICEYE (radar) and Iperlite/BELSPO.

### Lusospace secures investment for the Lusíada constellation

At the end of the year, Lusospace secured investment from Insight Venture to support the ATON project, a constellation of satellites based on VDES technology, geared towards maritime communications and safety, and valued at around €15 million. Alongside this, the company launched a crowdlending campaign with a target of €500,000, which by early January had already reached 98% of its goal.