

ESPI believes the question of Europe's ambition in space, and the role space will play in the future of Europe's global competitiveness is a topic that transcends political boundaries and ideologies. This brief is based on self-funded research and in no way represents an endorsement or support of any political party, political group or individual candidate, in line with previous publications on the European Parliament and the UK House of Commons elections in 2024.

Bundestag election 2025: Understanding the German space debate

Currently, German voters consider immigration and asylum (37%) and the economy (34%) as the two most important political priorities. Other issues, such as foreign policy, war and peace (14%), environment and climate (13%), and social inequality (11%), follow at a considerable distance.¹ While **space in itself is not a top political priority**, it is **critically linked to many of these key issues** shaping the electoral landscape, including **economic growth, competitiveness, internal security, defence, climate policy, and technological sovereignty**. Germany is the largest economy in Europe and contributor to the EU budget and, alongside France, the ESA budget. Germany will also host the ESA Ministerial Council in November 2025 and **by and large holds a pivotal position in shaping the continent's space ambitions**. However, in recent years Germany has enacted budget cuts, which also affected the space programme. Recent political developments, such as the **snap federal election scheduled for 23 February 2025**, and the related discussions surrounding the potential softening of the debt brake for investments, present a **significant opportunity for Germany to increase its space ambitions** and provide an impetus to Europe's future in space. Because of this, **understanding the German debate on space and the political salience and framing of the issue becomes crucial for navigating this challenging political environment**. Reviewing party manifestos, as done for this analysis, is particularly useful as these documents provide a structured, official, and comparative basis for understanding policy priorities.²

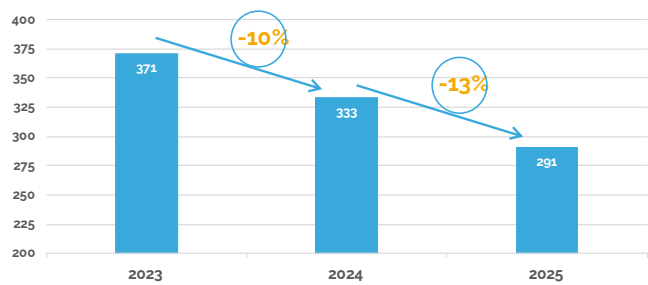


Figure 1: Budget evolution in Million EUR of the German national space programme (Source: BDI)

1. Declining Policy Discourse Despite an Increasingly Critical Role of Space

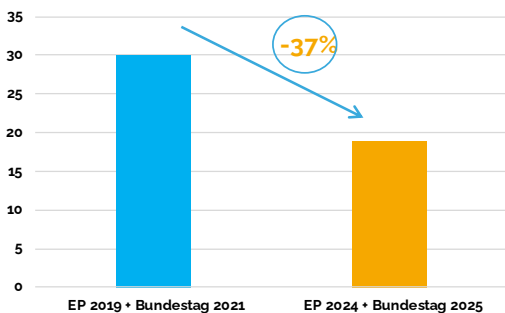


Figure 2: Mentions of space 2019/2021 vs 2024/2025

The **prominence of space policy in German election manifestos has dropped by 37%** in 2024-2025, compared to 2019-2021. This decrease suggests a shift in political priorities, potentially reflecting a reallocation of attention to more immediate security, economic, or social challenges. Despite the growing importance of space in geopolitical strategy, defence, and technological innovation, its reduced appearance in party programs indicates that it is not recognised as central electoral issue. Along with cuts to the space budget in Germany, this trend **underscores the need for targeted advocacy to ensure that the benefits of the**

critical role of space for urgent policy priorities are well understood by elected officials and their party bases. Without doing so, Germany risks falling behind in a domain that is increasingly central to competitiveness, resilience, and technological sovereignty.

¹ ARD-DeutschlandTrend ([Link](#))

² This Brief analyses manifestos from national elections in Germany as well as manifestos from German parties in European Parliament elections using data scraping and natural language processing methods. Manifestos from the 2019 EP election are grouped together with the ones from the Bundestag election 2021, as well as grouping manifestos from the EP election 2024 and Bundestag 2025. All manifestos are taken from the official websites of the parties.

Interestingly, this goes against trends at the supranational level, where in party manifestos throughout the European Union there has been a strong 41% increase in space mentions.³ This decrease of salience through manifestos is however not reflected when analysing activity in the German Bundestag where there has been an increase in activity regarding space issues in recent years, climbing to a new peak in 2024.⁴ This gives impetus to the notion that, while the importance of space on a political level is more widely acknowledged and discussed, it is something parties believe is of lesser importance in the wider political debate, neglecting the role it can play in addressing issues that voters care about and where parties want to invest political capital.

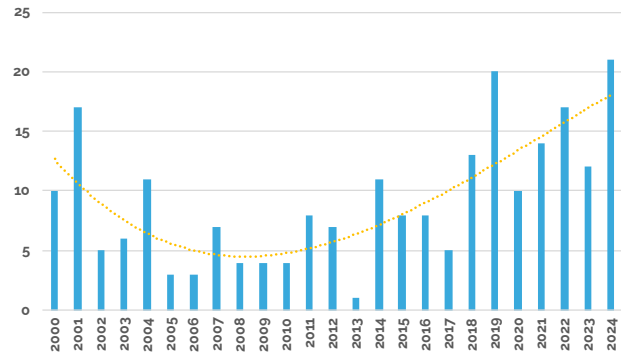


Figure 3: Evolution of space activity in the plenary of the Bundestag

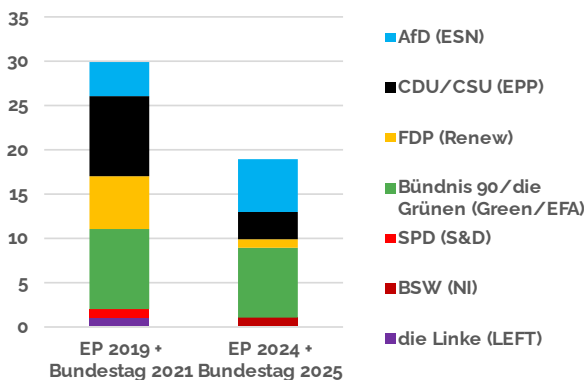


Figure 4: Mentions of space 2019/2021 vs 2024/2025 by party

The salience of space policy in German election manifestos has not declined uniformly across parties but has instead become more polarised, with increasing emphasis coming from right-wing parties. The AfD (ESN) has emerged as the most vocal party on space policy in their manifesto, accounting for half of the references in the most recent 2025 Bundestag election. Meanwhile, and if only judging by their manifestos, parties closer to the centre (and left of the centre) have reduced their attention to space. This indicates that the change in U.S. government and the new prominent role of Elon Musk in the Trump administration might have contributed to this decrease

and polarisation. Several parties have avoided mentioning space in order to not be associated with Musk, who has emerged as the world's preeminent voice for space. The strong presence of the Greens in 2024/2025 stems largely from the European Parliament election, before the Trump election, and not from the Bundestag election. **These reactions, across the political spectrum (and also visible beyond Germany's borders), underscore a fallacy in which parties and leaders seem to be primarily reacting to external impulse, in particular from the U.S., rather than developing their own rationale for European space ambitions.** Despite taking different paths, both approaches; blindly following the U.S., or avoiding space altogether, are a misstep towards increasing future dependencies.

"Aerospace is a key technology in which private companies such as SpaceX are revolutionising space travel through innovations such as reusable rockets." (AfD)

2. Space Industry & Capabilities Top Policy Discourse While Impact of Space Loses Out

However, space issues in party manifestos are not mentioned in a vacuum, but instead are linked to specific policy priorities.⁵ Space mentions in German party manifestos (Figure 5) largely revolve around

³ "Will space sit in the European Parliament?" ESPI Report 92 ([Link](#))

⁴ Activities refer to speeches, questions and answers, motions, small requests, reporting. All data has been retrieved from the archives of the Bundestag ([Link](#))

⁵ The research topics identified in ESPI2040 are taken as a theoretical foundation in order to analyse the framing of space issues. **Green and Sustainable Societies:** The use of space for reaching climate and sustainability goals. **Security & Defence:** The use of space to protect European values, for disaster management or for protecting space assets from attacks. **Exploration & Science:** Space Exploration and Science Missions to inspire citizens and leading scientific discoveries. **Space as an Asset:** The development of space capabilities (e.g. Launchers) as well as the national, European, and international regulatory foundations; this includes in-space sustainability measures. **Industry, Innovation, Finance, and Workforce (IIFW):** The macroeconomic enablers of the space industry and its impact on the wider economy. More info can be found in ESPI2024 ([Link](#)). Each mention can contain multiple frames.

Space as an Asset and **Industry, Innovation, Finance & Workforce**, with the latter being the **only policy priority seeing an increase** comparing the 2024-2025 timeframe with 2019-2021. In comparison to trends in party manifestos throughout Europe, it can be observed that (i) **the strong increase in relation to Security & Defence is not echoed**, (ii) Exploration and Science, as well as Green and Sustainable Societies are either stagnant or declining, similar to the EP election (iii) Space as an Asset, and Industry, Innovation, Finance & Workforce are the most pronounced frames, which also falls in line with supranational trends.⁶ This implies that political discourse

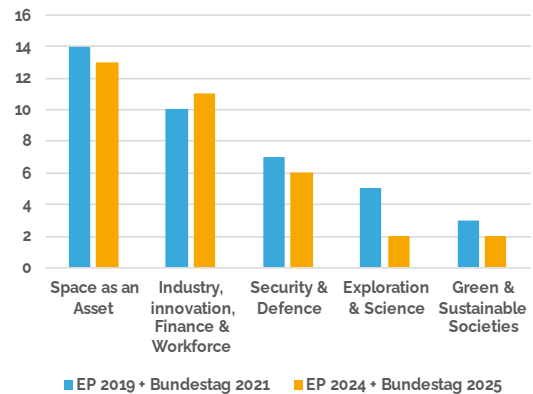


Figure 5: Mentions of space 2019/2021 vs 2024/2025 by ESPI2040 topic

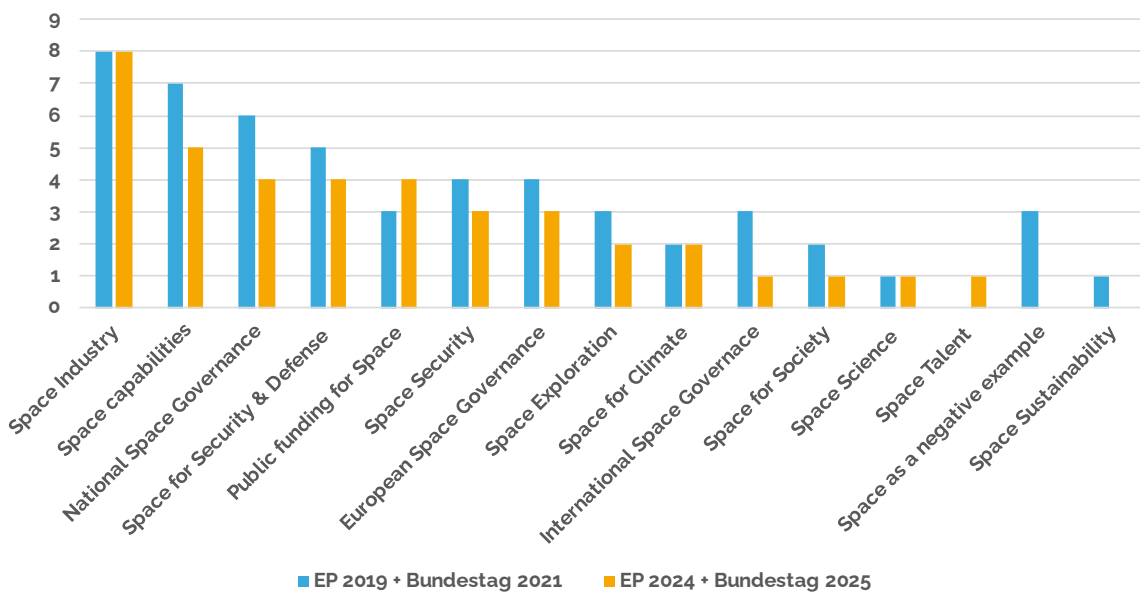


Figure 6: Mentions of space 2019/2021 vs 2024/2025 by impact or enabler

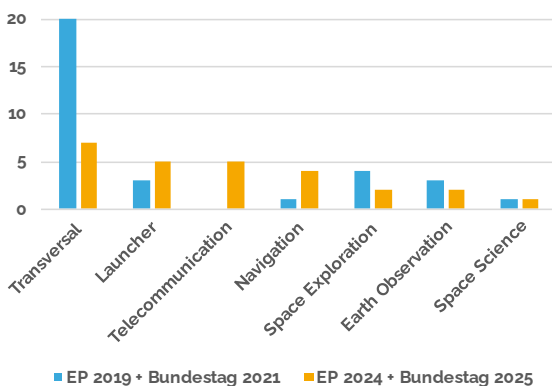


Figure 7: Mentions of space 2019/2021 vs 2024/2025 by space domain

dropped within party manifestos (-65%). Mentions related to concrete strategic capabilities remain overall stagnant, with more attention to Launchers, Telecommunications and Navigation and less focus on Earth Observation, as well as Exploration. In that sense, the loss and underperformance of Earth

on space is still focused on the input dimension (the foundations, and capabilities), while the benefits space brings to European values, supporting the ecological transition, and acting as a catalyst of innovation and inspiration, are only of secondary importance. A more granular overview of the type of topics space is associated with (Figure 6) reveals that **no single topic drives the overall decrease, rather it is a function of a general decline in salience across the board.**⁷

In terms of specific capabilities, it has to be noted that, even though transversal mentions still occur the most, **more general statements of support for space have**

⁶ "Will space sit in the European Parliament?" ESPI Report 92 ([Link](#))

⁷ Space capabilities (figure 6) refer to the endorsements to build up space capabilities in general or with regards to specific aspects (Launcher, EO, Satcom etc.).

Observation likely stems from a general decline in mentions regarding the space for sustainability nexus, as well as the potential of remote sensing for Security & Defence not being fully embraced.

3. Reclaiming the European discourse on Space

The analysis of manifestos has showcased that **space in German party programmes gets mentioned less and is more polarised**. While political parties might shape their space discourse based on their

“The increased importance of space for geopolitics, security and sustainability must be reflected even more strongly in necessary investments, a competitive European space industry, new space business models and sovereign access to space - for example for satellite communication, navigation and earth observation.” **(Alliance 90 / The Greens)**

affection or disdain for Musk or the new U.S. administration, the **significance of space for German and European security, economy, innovation, and inspiration demands a clear policy direction—one that prioritises national and European industry and citizens**.⁸ This highlights the need for a **purposeful and distinct European**

narrative for space, driven by opportunity instead of risk, that political parties and the wider public can also embrace and connect with. This compels Europe going beyond its current ambitions and developing autonomous capabilities in all aspects of the space domain, with **Germany as one of the cornerstones of this new European ambition**.

In order to achieve this, the **powerful role of space exploration** (human spaceflight, as well as Moon and Mars exploration) is **vital** due to its integral role in shaping discourse, fostering inspiration within the general public as well as attracting world-class talent to the space sector. Especially in this domain, Musk seems to have conquered the whole authority of public perception. Calls by the German Aerospace Industries Association (BDLI) for increasing the European exploration envelope in the next Ministerial Council, as well as calls by the **CDU for a European crew transporter and German Astronaut on the Moon**, are pointing in the right direction that should be embraced across the political spectrum.⁹ In that sense, an ambitious space exploration campaign can not only help Europe regain technological autonomy but also **reclaiming the lost issue ownership over the discourse on space**.

While an ambitious Europe in exploration can be conducive of a wider societal affinity to space, the **underrepresentation of space in the context of security & defence** is of **immediate concern** given the existential threat and geopolitical imbalances Europe and Germany face in early 2025. As the space and defence industrial bases (re)converge, elected representatives will be tested in the months ahead: ensuring that investments in European and national defence capabilities are forward looking and futureproof. The **successful integration of space capabilities** into these efforts will prove to be a **decisive measure of Europe's long-term resilience and preparedness**.

Moreover, the high prevalence of industry-related references in party programmes is further underscored by **ongoing transformative developments in the industrial base**; (i) the industrial (re)convergence of space and defence, (ii) the potential reshuffling of the European prime landscape, and (iii) Germany's successful fostering of the NewSpace ecosystem, the years to come provide a **rare window of opportunity** to provide policy direction towards a **reinforced and reinvigorated industrial base** that can change the course of Germany's competitiveness in space and increase the continent's resilience.

Ultimately, a positive future for Europe's space sector **hinges on political choices and budget commitments**, and the next cohort of *Abgeordnete* will have the responsibility of defining German and European space ambitions through allocations for the ESA Ministerial Council meetings in 2025 and beyond, the next MFF (2028 – 2034) and the German national programme.

⁸ See for example: More than a Space Program. The Value of Space Exploration to Empower the Future of Europe. ESPI/BCG 2023. [\(Link\)](#)

⁹ Die deutsche Luft- und Raumfahrtindustrie sichert die Souveränität Deutschlands. BDLI-Kernforderungen zur Bundestagswahl 2025. BDLI 2025. Weltraum als Chancenraum. Wachstum für Wirtschaft, Sicherheit, Forschung & Kooperation. CDU 2025. [\(Link\)](#)

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