



# CLIENT UPDATE



## Annual India NewSpace Roundup 2025

### Aditya-L1 First Scientific Data Release

On *January 6, 2025*, the Indian Space Research Organisation (“ISRO”) marked the first anniversary of Aditya-L1’s halo orbit insertion by releasing the mission’s inaugural scientific data set. Positioned at the Sun-Earth L1 point, Aditya-L1’s seven payloads - including VELC, SUIT, HELIOS, ASPEX, PAPA, SoLEXS, and MAG - captured critical solar phenomena like coronal mass ejections, X-ray flares, and plasma dynamics. This data, spanning September 2023 to December 2024, provides insights into solar wind, magnetic fields, and space weather impacts on Earth. The release, announced via ISRO’s portal, invites global researchers for proposals under the first announcement of opportunity cycle, fostering collaborations. Aditya-L1’s observations enhance India’s space weather forecasting, aiding satellite operations and power grids. With over 240 G-bits of daily data, the mission underscores India’s advancing solar science capabilities, aligning with global efforts like NASA’s Parker Probe.

### US-India Space Cooperation

The *February 2025* US-India Joint Leaders’ Statement under the TRUST Initiative reaffirmed deepened civil and commercial space ties, hailing 2025 as a “pioneering year” for collaboration. This included the successful launch of the NASA-ISRO NISAR satellite on July 30, 2025, from Sriharikota, providing advanced Earth observation (“EO”) data for climate monitoring and disaster management. Additionally, Indian astronaut Group Captain Shubhanshu Shukla participated in the Axiom Mission 4 (Ax-4) to the ISS in June-July 2025, marking India’s first government-sponsored private spaceflight. These efforts, supported by technology transfers and exercises like Global Sentinel, align with Artemis Accords commitments and aim to enhance strategic autonomy while fostering commercial opportunities.

However, dependencies on US export controls highlight potential vulnerabilities in bilateral relations. The cooperation extends to joint working groups on satellite navigation and debris mitigation, bolstering India’s USD 8.4 billion space economy toward USD 44 billion by 2033.

### Starlink Partnerships with Reliance Jio and Bharti Airtel

In *March 2025*, Starlink secured landmark partnerships with Reliance Jio and Bharti Airtel to introduce satellite broadband services in India, pending final Department of Telecommunications and IN-SPACe approvals under the Telecommunications Act, 2023. These agreements allow Jio and Airtel to distribute Starlink equipment through their retail networks and integrate satellite connectivity with existing mobile infrastructure, targeting underserved rural areas and businesses. The deals reverse prior opposition from local telecoms, emphasizing administrative spectrum allocation and compliance with data localization norms. While promising high-speed internet access to millions, the partnerships raise concerns over competitive neutrality, with Telecom Regulatory Authority of India consultations ongoing to ensure fair adjusted gross revenue charges (around 4%). This move aligns with Indian Space Policy 2023’s push for non-Indian satellite capacity but underscores regulatory scrutiny on foreign entities for national security, potentially expanding India’s broadband penetration to 85% by 2030.

### Gujarat SpaceTech Policy (2025-30)

The Gujarat SpaceTech Policy 2025-30 was released on *April 15, 2025*, setting out a comprehensive framework to position Gujarat as a leading hub for space technology by promoting manufacturing of satellites and related hardware, strengthening ground-segment



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infrastructure, and advancing space applications and design services. The policy introduces targeted incentives such as launch cost assistance, patent reimbursement support, eligibility for benefits under the Electronics and IT/ITeS policies, and subsidies for accessing common technical facilities. It emphasizes startup development, collaboration with ISRO and IN-SPaCE, creation of a Space Manufacturing Park, establishment of a Centre of Excellence, and facilitation of future launchpad infrastructure. Institutional mechanisms including a State Level Empowered Committee and Technical Advisory Committee are outlined to ensure structured implementation and governance, supported by a dedicated budgetary framework. Aligned with Indian Space Policy 2023, it aims to attract ₹15,000 crore investments and create 20,000 jobs, leveraging Gujarat's industrial base for global competitiveness.

## Telecommunications (Framework for Standards, Conformity Assessment and Certification) Rules, 2025

The Telecommunications (Framework for Standards, Conformity Assessment and Certification) Rules, 2025 were introduced on May 16, 2025 for a more structured and mandatory compliance regime. The Rules establish a framework under the Telecommunications Act, 2023 for notifying standards, running conformity assessment, and issuing certification for telecom equipment, with the Telecommunication Engineering Centre and National Centre for Communication Security as Appropriate Authorities and scope for additional designations by the Central Government. By institutionalising testing, verification, and documentation obligations, the framework enhances regulatory certainty while significantly tightening operational accountability for satellite broadband providers and space-based communication entities operating in India. Issued under the Telecommunications Act, 2023, it designates the Telecommunication Engineering Centre and National Centre for Communication Security as authorities, with provisions for additional designations. This supports India's digital infrastructure, ensuring secure satcom amid growing Low Earth Orbit constellations.

## Tamil Nadu Space Industrial Policy 2025

The Tamil Nadu Space Industrial Policy 2025 represents a landmark initiative by the Government of Tamil Nadu, formulated to establish the state as a competitive hub for space technology manufacturing, services, and innovation. Approved by the state cabinet and developed under the aegis of the Tamil Nadu Industrial Development Corporation ("TIDCO"), the policy aligns with the national *Indian Space Policy 2023* and seeks to attract investments of ₹10,000 crore over a period of five years while generating approximately 10,000 direct and indirect jobs in the space ecosystem. The policy emphasises space sector growth

by leveraging Tamil Nadu's strengths in electronics, precision engineering, and advanced manufacturing, and by facilitating private sector participation across satellite manufacturing, launch services, and satellite-based applications. Key features include incentives such as payroll subsidies for research and development, the creation of *Space Bays* - designated zones for space industry development - and structured support for startups and small enterprises. The policy also builds on existing infrastructure, including the ISRO Propulsion Complex at Mahendragiri and the under-development Kulasekarapattinam spaceport, and encourages innovation through incubators such as the Space Technology Incubation Centre at NIT Tiruchirappalli. Collectively, these measures are designed to foster an enabling environment for space technology enterprises and position Tamil Nadu as a significant contributor to India's expanding space economy.

## Draft Space Activities Bill

Pawan Goenka, Chairperson of IN-SPaCE, announced on May 25, 2025, that the Government of India has redrafted the Draft Space Activities Bill after eight years of the release of Space Activities Bill 2017, marking a significant step toward establishing a dedicated statutory regime for space operations and private sector participation. The proposed legislation is intended to provide legal backing and regulatory authority to IN-SPaCE, streamline authorisation procedures for private entities, clarify liability and insurance requirements, and align India's domestic legal obligations with its international space treaty commitments. Evolving from earlier drafts first introduced in 2017, the updated bill incorporates industry feedback, seeks to reduce regulatory uncertainty, and aims to create an enabling yet accountable framework to support India's expanding space economy ahead of parliamentary consideration. The bill underwent internal review and is slated for public consultation in Q2 2026, addressing gaps in intellectual property, liability, and appeals for the USD 44 billion target by 2033.

## Andhra Pradesh Space Policy 4.0 (2025-2030)

The Government of Andhra Pradesh unveiled the Andhra Pradesh Space Policy 4.0 on July 13, 2025, aiming to position the state as a premier hub for space manufacturing and innovation. Aligned with the national *Indian Space Policy 2023*, the policy targets ₹25,000 crore in investments over the next decade and the creation of 5,000 direct and 30,000 indirect jobs. Key provisions include subsidies up to 45% on fixed capital for MSMEs, 100% SGST reimbursement for five years, a dedicated ₹100 crore SpaceTech Fund, and startup grants of up to ₹20 lakhs. The policy promotes the development of Space Cities, decarbonization incentives (10-25% subsidies), and public-private partnerships, leveraging proximity to ISRO's



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Sriharikota facility. Administered by the Andhra Pradesh Space City Corporation, it emphasizes upstream, midstream, and downstream segments, including satellite manufacturing and launch services, to drive inclusive growth and attract global players while ensuring environmental sustainability.

## IN-SPACe Transition Framework for Non-Indian Satellite Capacity

IN-SPACe issued a notification establishing a transition mechanism for capacity provisioning from non-Indian satellites on *July 15, 2025*. While requiring new contracts between IN-SPACe-authorized Indian entities and users, the order extends the validity of existing agreements until *March 31, 2026* to ensure continuity, provided they involve satellites authorized by IN-SPACe.

- From **October 1, 2025**, only authorized non-Indian satellites may provide capacity in India.
- From **April 1, 2026**, only contracts executed through authorized Indian entities will remain valid, consolidating regulatory oversight and ensuring a structured shift from legacy arrangements to a fully compliant contracting regime.

## IN-SPACe Awards Earth Observation Public-Private Partnership

On *August 12, 2025*, IN-SPACe awarded the EO Public-Private Partnership contract to a consortium led by Pixxel, including Dhruva Space, SatSure, and Piersight, for India's first fully indigenous private EO satellite network. The project involves designing, building, launching, and operating 12 satellites over five years with an investment exceeding ₹1,200 crore. The constellation will provide high-resolution panchromatic, multispectral, and hyperspectral imagery for applications in agriculture, disaster management, and urban planning. Funded through a zero-bid model where the consortium invests upfront and recoups via data sales, it aligns with Indian Space Policy 2023 to boost private sector capabilities. This initiative aims to reduce reliance on foreign data, enhancing national security and economic value, with expected annual revenues of ₹500 crore post-launch.

## Telecommunications (Telecom Cyber Security) Amendment Rules, 2025

The Government of India notified the Telecommunications (Telecom Cyber Security) Amendment Rules, 2025 on *October 22, 2025*, introducing enhanced security governance obligations across telecom and satellite communication infrastructure.

## IN-SPACe and SIDBI Venture Capital Fund

On *November 10, 2025*, IN-SPACe and SIDBI Venture Capital Limited signed an agreement to operationalize the ₹1,000 crore Venture Capital Fund, approved by the Union Cabinet in October 2024. This fund aims to catalyze India's space economy, projected to reach USD 44 billion by 2033, by providing seed, growth, and equity funding to approximately 40 startups and MSMEs. The initiative mandates alignment with national security and Indian Space Policy 2023, requiring IN-SPACe approvals for funded projects. By addressing funding gaps in the private sector, which saw USD 150 million in investments during financial year 2025, the fund supports technology transfers from ISRO and fosters self-reliance, though critics note potential biases toward established players.

## Prime Minister Inaugurates Skyroot Aerospace's Infinity Campus

On *November 27, 2025*, Prime Minister Narendra Modi virtually inaugurated Skyroot Aerospace's Infinity Campus in Hyderabad and unveiled Vikram-I, India's first private orbital launch vehicle. The 100-acre facility, India's largest private rocket manufacturing hub, features integrated design, production, and testing capabilities, supporting end-to-end launches. Vikram-I, a three-stage rocket with 475 kg payload to 500 km low earth orbit, marks a milestone in private space tech, with maiden flight planned for 2026. The event highlighted India's self-reliance, with PM praising Skyroot's innovation in carbon fiber structures and 3D-printed engines. Aligned with Indian Space Policy 2023, the campus aims to create 1,000 jobs and attract ₹2,000 crore investments, boosting the USD 8.4 billion economy. Skyroot, founded in 2018, has raised USD 95 million, positioning India as a global launch provider.

Please feel free to address any further questions or request for advice to:

### Ankita Kumar

Partner  
ankita.kumar@AMSShardul.com

### Tanya Srivastava

Associate  
tanya.srivastava@AMSShardul.com

### Kaustubh Kumar

Associate  
kaustubh.kumar@AMSShardul.com

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