Summary and Analysis of President Trump's Executive Order 14369 on US Space Policy

Executive Order 14369 (the EO) calls for America's return to the moon by 2028 and initial elements of a permanent lunar outpost by 2030, with a commercial pathway to replace the International Space Station (ISS) by 2030.

The EO directs a "National Initiative for American Space Nuclear Power," including planning for deployment of nuclear reactors on the moon and in orbit.

The EO revokes the Biden-era Executive Order 14056 (National Space Council) and elevates the White House Office of Science and Technology Policy (OSTP) as the coordinator for National Space Policy efforts.

The order directs development and implementation steps for a "responsive and adaptive" national security space architecture, including commercial integration and new market entrants.

NASA and the Department of Commerce must reform acquisition processes with a first preference for commercial solutions and a general preference for Other Transaction Authority (OTA), Space Act Agreements, and "customary commercial terms."

Within 120 days, Commerce must complete a spectrum review that expressly includes "reapportioning and sharing spectrum."

The EO amends Space Policy Directive-3 (SPD-3) by deleting language committing to "free of direct user fees" for basic Space Situational Awareness (SSA) / Space Traffic Management (STM) services, paving the way for future cost-recovery.

On Dec. 18, 2025, President Donald Trump signed the EO, "Ensuring American Space Superiority."

The administration is actively working on efforts directed in the EO, including an upcoming deadline of Feb. 16. 2026, for the delivery of guidance for the "National Initiative for American Space Nuclear Power."

The order directs the administration's space policy priorities, including a return of Americans to the moon by 2028, initial elements of a permanent lunar outpost by 2030, a commercial replacement of the ISS by 2030, developing and demonstrating prototype next generation missile defense technologies by 2028, attracting at least $50 billion of additional investment in American space markets by 2028, and enabling commercial launch services. The EO's near-term legal and business significance is procedural and policy: reassigning space-policy coordination inside the White House, directing agencies to produce reports, signaling procurement preferences for commercial solutions, OTAs, Space Act Agreements, and exploring potential changes in spectrum and space traffic management policy.

Key deadlines (based on Dec. 18, 2025, signature date)
By Feb. 16, 2026 (60 days): OSTP-led guidance for the “National Initiative for American Space Nuclear Power.”

By March 18, 2026 (90 days): NASA plan for exploration objectives and a federal reporting package on programs and industrial base gaps (including missile defense-related supply chain issues).

By April 17, 2026 (120 days): Commerce spectrum leadership review; NASA/State Department review of international civil space arrangements; and a proposal to revise the National Space Transportation Policy (revision to PPD-26 of Nov. 21, 2013).

By June 16, 2026 (180 days): NASA and Commerce acquisition reforms; and national security space strategy/architecture steps.
What the EO Does

The EO is an overarching “execution order” that sets exploration and security priorities and requires agency deliverables on tight timelines. While the EO does not appropriate funding or rewrite statutes, it might still materially affect industry by driving agency planning, procurement approach, and interagency coordination.

A key structural move is the shift in the White House itself: the EO elevates the Office of Science and Technology Policy (OSTP) as a central coordinator and eliminates the National Space Council framework established under former President Biden.

On the national security side, the EO emphasizes commercial integration. Even without immediate new contracting authorities, these directives may lead to accelerated acquisition, higher demand for commercial offerings, and sharper scrutiny of cost and schedule performance.

Acquisition Reform and “Commercial-First” Procurement
A centerpiece of the EO is acquisition reform at NASA and the Department of Commerce. The EO instructs these agencies to adopt a first preference for commercial solutions and to rely more on streamlined instruments such as OTA arrangements and Space Act Agreements, along with “customary commercial terms” where appropriate. In practice, this might shift procurements away from traditional FAR-heavy designs and toward milestone-based performance structures, faster down selects, and more negotiated approaches on intellectual property, data rights, warranties, and allocation of risk.

For Commerce specifically, the EO contemplates building procurement capacity that does not require NASA acquisition support. If implemented, this might change the market for weather data and civil space domain awareness and related services by creating new buyers, new contract vehicles, and procurement organizations inside Commerce that can run their own competitive actions.

Spectrum: Commerce-Led Review with Reallocation and Sharing on the Table
The EO directs Commerce to coordinate with other agencies to complete a near-term "spectrum leadership" review that explicitly includes opportunities for reapportioning and sharing radiofrequency spectrum. For satellite operators, the EO comes at a time when spectrum demand is high and signals the administration may not think the FCC's ongoing efforts to review spectrum sharing rules and modernize licensing go far enough. The EO may also point towards an increased reliance on interference mitigation strategies, flexible payload architectures, and dynamic spectrum-sharing capabilities.

Space Traffic Management and SSA: Removing the "Free" Policy Constraint
The EO amends SPD-3 by deleting language committing to providing certain basic space situational awareness and space traffic management services free of direct user fees. This change does not itself impose fees or create billing authority, but it removes a policy constraint that previously disfavored fee-based or cost-recovery models. Over time, this may support new business models for SSA/STM providers, while encouraging operators, particularly large constellations, to budget for the possibility that "free baseline" services may no longer be free of charge.

Conclusion
As the administration prepares to finalize and release the FY27 President's Budget Request (PBR), EO 14369 has provided policy direction that may inform the FY27 as well as future budgets. The EO also provides insight on the administration's intent on key U.S. government space programs, including Artemis, Golden Dome, and NOAA weather monitoring satellites.

第14369号行政令（该行政令）要求美国在2028年前重返月球，并在2030年前建成永久性月球基地的初期设施，同时通过商业化途径在2030年前取代国际空间站（ISS）。

该行政令指示启动“美国空间核能国家计划”，包括规划在月球及轨道部署核反应堆。

该行政令撤销了拜登时期的第14056号行政令（国家空间委员会），并提升白宫科技政策办公室（OSTP）作为国家空间政策工作的协调机构。

该行政令要求制定和实施“响应式、自适应”的国家安全空间架构的步骤，包括商业整合与新兴市场参与。

美国国家航空航天局（NASA）和商务部必须改革采购流程，优先考虑商业解决方案，并总体上倾向于采用其他交易权限（OTA）、《空间法案》协议及“惯常商业条款”。

商务部须在120天内完成频谱审查，其中明确包含“频谱重新分配与共享”。

该行政令通过删除《空间政策指令-3》（SPD-3）中关于基本空间态势感知（SSA）/空间交通管理（STM）服务“免收直接用户费用”的承诺条款，为未来实施成本回收铺平了道路。

2025年12月18日，唐纳德·特朗普总统签署了名为“确保美国空间优势”的该行政令。

政府正在积极落实该行政令中的各项要求，其中即将到来的一个截止日期是2026年2月16日，届时需提交关于“美国空间核能国家计划”的指导文件。

该行政令明确了政府在空间政策方面的优先事项，包括：2028年前让美国人重返月球；2030年前建成永久性月球基地的初期设施；2030年前以商业方案取代国际空间站；2028年前研发并演示下一代导弹防御技术原型；到2028年吸引至少500亿美元的额外投资进入美国空间市场；以及促进商业发射服务。该行政令近期的法律和商业意义在于程序与政策层面：重新分配白宫内部的空间政策协调职责；要求各机构提交报告；表明对商业解决方案、OTA、《空间法案》协议的采购偏好；并探索频谱和空间交通管理政策的潜在变革。

关键截止日期（基于2025年12月18日签署日）

· 2026年2月16日前（60天）：由OSTP牵头制定“美国空间核能国家计划”指导文件。
· 2026年3月18日前（90天）：NASA提交探索目标计划，以及一份关于项目及工业基础差距（包括与导弹防御相关的供应链问题）的联邦报告。
· 2026年4月17日前（120天）：商务部完成频谱领导力审查；NASA/国务院完成对国际民用空间安排的审查；提交修订《国家空间运输政策》（修订2013年11月21日的PPD-26）的提案。
· 2026年6月16日前（180天）：NASA和商务部完成采购改革；实施国家安全空间战略/架构相关步骤。

行政令的作用

该行政令是一项总体性的“执行令”，设定了探索与安全优先事项，并要求各机构在紧迫的时间表内交付成果。虽然该行政令并未拨款或修改法规，但它仍可能通过推动机构规划、采购方法和跨部门协调，对行业产生实质性影响。

一项关键的结构性调整发生在白宫内部：该行政令提升了科技政策办公室（OSTP）作为核心协调机构的地位，并取消了前总统拜登时期设立的国家空间委员会框架。

在国家安全方面，该行政令强调商业整合。即使没有立即新增合同授权，这些指令也可能导致采购加速、对商业方案的需求增加，以及对成本与进度绩效更严格的审查。

采购改革与“商业优先”采购

该行政令的核心内容之一是NASA和商务部的采购改革。它指示这些机构优先考虑商业解决方案，并更多地依赖简化合同工具，如OTA安排和《空间法案》协议，并在适当情况下采用“惯常商业条款”。实际上，这可能使采购从传统、繁重的《联邦采购条例》（FAR）模式转向基于里程碑的绩效结构、更快的候选方案筛选，以及在知识产权、数据权利、担保和风险分配方面采用更多协商方式。

对于商务部，该行政令设想建立无需依赖NASA采购支持的自主采购能力。如果得以实施，这可能通过创造新的采购方、新的合同工具以及商务部内部能够自行运行竞争性采购的组织，从而改变气象数据、民用空间态势感知及相关服务的市场。

频谱：商务部主导的审查，包含重新分配与共享选项

该行政令指示商务部与其他机构协调，在短期内完成一项“频谱领导力”审查，其中明确包括重新分配和共享无线电频率频谱的机会。对于卫星运营商而言，该行政令出台正值频谱需求高涨之时，并表明政府可能认为联邦通信委员会（FCC）正在进行的频谱共享规则审查和许可现代化工作力度不足。该行政令还可能指向将更加依赖干扰缓解策略、灵活载荷架构和动态频谱共享能力。

空间交通管理与SSA：移除“免费”政策约束

该行政令通过删除SPD-3中关于提供某些基本空间态势感知和空间交通管理服务免收直接用户费用的承诺条款，对其进行了修订。这一变化本身并未征收费用或创建收费权限，但它移除了先前不利于基于收费或成本回收模式的政策限制。长远来看，这可能为SSA/STM提供商支持新的商业模式，同时促使运营商（特别是大型星座运营商）为“免费基线”服务可能不再免费的可能性做好预算准备。

结论

随着政府准备最终确定并发布2027财年总统预算请求（PBR），第14369号行政令提供的政策方向可能影响2027财年及未来的预算。该行政令还揭示了政府在关键美国空间项目上的意图，包括“阿耳忒弥斯”计划、“金顶”计划以及NOAA气象卫星项目。