

SPACEHAB INC \WA\  
Form SC TO-I/A  
October 27, 2005

**SECURITIES AND EXCHANGE COMMISSION**

**WASHINGTON, D.C. 20549**

**Amendment No. 5**

**to**

**SCHEDULE TO**

**(Rule 14d-100)**

**Tender Offer Statement Under Section 14(d)(1) or 13(e)(1) of  
the Securities Exchange Act of 1934**

**SPACEHAB, Incorporated**

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**(Name of Subject Company (Issuer))**

**SPACEHAB, Incorporated**

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**(Name of Filing Person (Issuer))**

**8% Convertible Subordinated Notes due 2007**

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**(Title of Class of Securities)**

846243 AA 1

846243 AC 7

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(CUSIP Number of Class of Securities)

**Michael E. Kearney**

**12130 State Highway 3, Building 1**

**Webster, Texas 77598**

**Telephone: (713) 558-5000**

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(Name, address and telephone number of person authorized to receive notices and communications on behalf of filing persons)

**Copies to:**

**Arthur S. Berner  
Haynes and Boone, LLP  
1221 McKinney Street, Suite 2100  
Houston, Texas 77010  
Telephone: (713) 547-2526**

**Rick C. Madden  
Skadden, Arps, Slate, Meagher & Flom LLP  
300 South Grand Avenue, Suite 3400  
Los Angeles, California 90071  
Telephone: (213) 687-5000**

**CALCULATION OF FILING FEE**

**Transaction Valuation(1)  
\$63,250,000**

**Amount of Filing Fee(2)  
\$7,445**

(1) The transaction valuation upon which the filing fee was based was calculated based on the maximum aggregate principal amount of the Issuer's 5.5% Senior Convertible Notes due 2010 that could be exchanged for the \$63,250,000 in principal amount outstanding of the Issuer's 8% Convertible Subordinated Notes Due 2007.

(2) Previously paid.

x Check box if any part of the fee is offset as provided by Rule 0-11(a)(2) and identify the filing with which the offsetting fee was previously paid. Identify the previous filing by registration statement number, or the Form or Schedule and the date of its filing.

Amount Previously Paid: \$7,445

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Form or Registration No.: S-4 Registration Statement

(File No. 333-126772)

Filing Party: SPACEHAB, Incorporated

Date Filed: July 21, 2005

Check the box if the filing relates solely to preliminary communications made before the commencement of a tender offer.

Check the appropriate boxes below to designate any transactions to which the statement relates:

- third-party tender offer subject to Rule 14d-1.
- issuer tender offer subject to Rule 13e-4.
- going-private transaction subject to Rule 13e-3.
- amendment to Schedule 13D under Rule 13d-2.

Check the following box if the filing is a final amendment reporting the results of the tender offer.

This Amendment No. 5 to the Tender Offer Statement on Schedule TO amends and supplements the Tender Offer Statement filed by SPACEHAB, Incorporated (the **Company**) with the Securities and Exchange Commission on July 21, 2005 (the **Schedule TO**), Amendment No. 1 to Schedule TO filed with the Securities and Exchange Commission on September 7, 2005, Amendment No. 2 to Schedule TO filed with the Securities and Exchange Commission on September 15, 2005, Amendment No. 3 to Schedule TO filed with the Securities and Exchange Commission on October 11, 2005, and Amendment No. 4 to Schedule TO filed with the Securities and Exchange Commission on October 20, 2005 in connection with the Company's offer to exchange (the **Exchange Offer**) for up to \$63,250,000 in aggregate principal amount of its 5.5% Senior Convertible Notes due 2010 for any and all of its currently outstanding 8% Convertible Subordinated Notes due 2007 (the **Outstanding Notes**).

The Exchange Offer is subject to the terms and conditions set forth in the prospectus, as amended or supplemented from time to time (the **Prospectus**), forming a part of the Company's Registration Statement on Form S-4 as originally filed with the Securities and Exchange Commission on July 21, 2005 (the **Registration Statement**) and the related Letter of Transmittal, a form of which has been filed as Exhibit 99.1 of the Registration Statement (the **Letter of Transmittal**).

**Item 12. Exhibits.**

Item 12 of the Schedule TO is hereby amended and supplemented to add the following exhibit:

- (a)(12) Prospectus supplement dated as of October 27, 2005.

**SIGNATURES**

After due inquiry and to the best of my knowledge and belief, I certify that the information set forth in this statement is true, complete and correct.

Dated: October 27, 2005

**SPACEHAB, Incorporated**

By:           /s/ Brian K. Harrington          

Name: Brian K. Harrington

Title: Senior Vice President,

Chief Financial Officer,

Secretary and Treasurer

**EXHIBIT INDEX**

(a)(12) Prospectus supplement dated as of October 27, 2005.

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