

## BRIEF

EUROPEAN AUTONOMY IN  
ORBIT

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| BÉATRICE HAINAUT |

**One hour before the start of Russia's full-scale invasion of Ukraine, a cyberattack disabled user terminals connected to the ViaSat KA-SAT geostationary satellite network used by the Ukrainian military and civilian population. This attack created ripple effects across Europe, affecting tens of thousands of satellite broadband users in France, Germany, Greece, Hungary, Italy, Poland, and the UK. It thus highlighted the vulnerability of commercial space systems—assets on which European states depend for both economic stability and security—and the difficulty of finding appropriate political, diplomatic, and operational responses to sub-threshold aggression. On 26 February, Ukraine asked Elon Musk for Starlink terminals, which provide high-speed, stable, and interference-resistant connection, and extensive coverage independent of local infrastructure. Deliveries began two days later, enabling vital command and control, and tactical coordination. While Ukraine can now rely on OneWeb connectivity satellites operated by Eutelsat, in early 2022, the EU had no such solution to offer.**

Space systems have become indispensable to governments and societies as countries have steadily developed a wide range of space-enabled services that underpin economic activity, national security, and even daily life (GPS, banking transactions, weather forecasts, logistics, etc.). The relative rapidity of this evolution since the 1990s has left users insufficiently prepared for any disruption, but the critical importance of space infrastructure tends to become apparent only when these systems fail.

At the same time, space assets have become targets. Potential adversaries (among others, Russia and China) have clearly recognised that the very systems that enable modern economies and security architectures are also a critical vulnerability for space powers, including Europe.<sup>1</sup> Against the backdrop of the growing risks to space systems, this brief surveys the current space environment, examines the EU's pursuit of greater autonomy in space, and assesses the remaining challenges faced by European stakeholders.

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THE COMMERCIAL-MILITARY  
INTERFACE

Experience of the use of commercial satellites in wartime has been mixed. These constellations are not military systems and do not always benefit from enhanced protection against hostile actions. Also, service availability is not guaranteed, as illustrated by the decisions of SpaceX to restrict the use of certain capabilities in active combat zones.<sup>2</sup> Furthermore, commercial systems may also be used by adversaries—either through unauthorised access or because providers supply services without discrimination.<sup>3</sup> Such limitations apply not only to connectivity services but also to other domains such as imagery and signals intelligence. For example, Ukraine, with financial backing from donors, secured access to satellites

from the Finnish ICEYE radar-imaging constellation, permitting on-demand tasking and continuous access rather than standard customer-level service.<sup>4</sup>

Even so, commercial actors have now become indispensable partners in peacetime—and even more so in wartime—requiring European states to anticipate and structure their relationships with these providers well before crises occur. The US has already moved in this direction, publishing a strategy for integrating commercial capabilities and picturing a future architecture built on a dense mix of civilian and military satellites. This type of document is essential at a time when threats of kinetic attacks (anti-satellite missiles) and non-kinetic attacks (direct energy, electronic warfare, cyberattacks, espionage) against space systems are multiplying.<sup>5</sup>

*Genuine strategic autonomy cannot rely on a limited number of countries or a space coalition of the willing*

At the same time, some highly sought-after orbits are beginning to be congested, and the need for space traffic coordination is emerging. Without genuine global governance and in a tense geopolitical context, EU Member States (MS) wish to guarantee unrestricted access to critical space services. NATO may still be the cornerstone of European security and has renewed its ambitions for space, but it does not develop its own space capabilities and is dependent on assets provided by Allies—in particular the US.<sup>6</sup> In the wake of the war in Ukraine and growing doubts about America's reliability, the concept of autonomy—both broadly and in the space domain—has grown in importance for the EU.

## BUILDING EUROPEAN AUTONOMY IN SPACE

In Europe, space capabilities have historically been built by western European countries. France occupies a central position, with a long tradition in both civil and military space, supported by a comprehensive ecosystem encompassing launchers, satellites, sensors, and

telecommunications. Germany, Italy, Spain, and the UK are also key players, with well-established expertise in areas such as Earth observation, telecommunications and (particularly in the case of Italy) radar observation. Today, European space capacity is evolving, with the emergence of dynamic space industries, often driven by private and commercial initiatives, and commonly referred to as 'New Space'. Finland, Sweden, Luxembourg, Poland, and the Baltic states, for example, are all developing niche capabilities such as commercial radar imagery and small satellite technologies. A broader and more diverse space ecosystem is thus gradually taking shape across Europe.

After Russia's full-scale invasion of Ukraine, countries like France recognised the importance of autonomous access to space and of national and European government and military capabilities.<sup>7</sup> Yet genuine strategic autonomy in this domain cannot rely on a limited number of countries or a space coalition of the willing. All MS are affected by space-based vulnerabilities and must be protected as critical centres of gravity likely to be targeted first. Both aspects are important: space capability development and the security of these critical infrastructures.

Russia's war accelerated EU decision-making on space defence. The IRIS<sup>2</sup> secure connectivity constellation project was initiated in 2022, and the European Space Strategy for Security and Defence published in 2023.<sup>8</sup> This acknowledged that satellite navigation, communications, and imagery were critical to the military domain and that sovereign solutions to strengthen strategic independence through a dual-use approach linking civil and security applications were needed. President Trump's return to the White House, his open hostility towards Europe, and his administration's intent to scale back US capacities on the continent reinforced this perception.

## PROGRESS

However, governance issues make it difficult to implement a genuine space policy at EU level. For legal reasons, EU space programmes are formally civilian but may support Common Security and Defence Policy (CSDP) missions if MS decide. In fact, EU space policy is increasingly

connected to the CSDP and national security needs. Space infrastructure is built by MS and operated under national control, while the EU provides technology, coordination, and the legal framework.

The introduction in 2021 of the EU Space Programme Regulation, which established a programme for 2021–27 and created the EU Agency for the Space Programme as a unified legal framework to replace previous sectoral rules, was a major step. The programme includes the global navigation satellite system Galileo, the European Geostationary Navigation Overlay Service, the Earth observation programme Copernicus, space situational awareness (including surveillance, tracking, space weather and near-Earth objects), and Government Satellite Communications, all with the objective of reinforcing EU technological autonomy.

Meanwhile, the European Space Agency's (ESA) new initiative, European Resilience from Space, will receive a budget of €1.2 bn and a "clear mandate for use of space applications for non-aggressive defence purposes."<sup>9</sup> Another key decision reflecting the importance of space and the need for greater intra-European coordination was the creation in 2024 of the post of Commissioner for Defence and Space, currently held by Andrius Kubilius.

*Space is necessarily an area of close cooperation between the EU and NATO*

NATO too has an overarching space policy and a commercial space strategy, as well as a space operations centre, and a programme aimed at enhancing space-based surveillance and intelligence for the Alliance.<sup>10</sup> It has also declared space to be an operational domain. The EU, which complements NATO, now provides support both financially and in terms of advancing the Alliance's capability objectives. Space is thus necessarily an area of close cooperation between the EU and NATO.

However, the emerging strategic divergence and potential US disengagement from the European continent have exposed NATO's heavy reliance on US space capabilities (as well as other strategic enablers such as ISR and C2). For

Europe, then, there is some urgency in building space capabilities. Efforts are currently focused on IRIS<sup>2</sup>, whose first operational elements are expected by 2030. The financial and contractual arrangements for this programme were put in place extremely quickly, showing that, even in the absence of an appropriate European framework, obstacles can be overcome if there is sufficient political will.

More broadly, both European states and EU institutions are increasingly taking ownership of defence and space issues. In November 2025, MS committed €22.3 bn to the ESA budget for the 2026–28 budget, an overall increase of 30% compared with the period 2022–25. As part of this, Estonia increased its contribution by 132%, Latvia by 100%, and Lithuania by 160%.<sup>11</sup> Discussions are also set to begin on the next EU Multiannual Financial Framework (MFF), which will hopefully see a significant increase in the budget allocated to space—just €14.8 bn in the current MFF.

## CHALLENGES

Despite this progress, some challenges to developing European autonomy in the space domain remain. First, while funding is increasing and institutional arrangements are gradually becoming clearer, effective resource allocation and robust governance are still critical. Discussions regarding the prerogatives of the MS, the Commission, and ESA, for example, are still to be concluded.

Second, increased funding should not be driven solely by short-term geopolitical dynamics. The development of defence-related space capabilities is intrinsically a long-term process, requiring sustained, coordinated investment by a broad coalition of MS. Achieving tangible outcomes will depend on the current increases in funding continuing.

Thirdly, as underlined by the Draghi report, competition persists among certain European states, and industrial policy constraints still limit the EU's overall effectiveness.<sup>12</sup> Also, space budgets are increasing at the national level, leading to the development of national solutions. As Commissioner Kubilius noted, "From one side—it's good: we individually are becoming stronger in space, but on the other

hand: we risk also becoming more fragmented.”<sup>13</sup> As with the rest of the defence industry, the MS may need to step up coordination within the European Defence Agency, perhaps to develop ‘European champions’ and become more competitive globally.

Finally, the growing convergence between space and digital technologies underscores that strategic autonomy in space cannot be achieved without parallel progress toward digital sovereignty. In this regard, Estonia—and the Baltic states more broadly—may have a key role to play, given their experience in cyber defence and AI.

## ENDNOTES

- <sup>1</sup> “Quasi-civilian infrastructure may become a legitimate target for retaliation.” For the full text, see: K.V. Vorontsov, [Statement by the Head of the Russian Delegation K.V. Vorontsov at the second session of the Open-Ended Working Group established pursuant to UNGA resolution 76/231](#) (unofficial translation) (UNODA, 12 September 2022).
- <sup>2</sup> Sandra Erwin, “[Limits on Ukraine’s use of Starlink for war operations is a lesson for U.S. military](#), *SpaceNews*,” *Space News*, 9 March 2023; Jeff Foust, “[Shotwell: Ukraine « weaponized » Starlink in war against Russia](#),” *Space News*, 8 February 2023.
- <sup>3</sup> Pjotr Sauer, “[Russian military scrambles to find Starlink alternative after access blocked](#),” *The Guardian*, 9 February 2026.
- <sup>4</sup> “[Ukraine expands partnership with ICEYE](#),” Press Release, ICEYE, 19 January 2026.
- <sup>5</sup> Victoria Samson and Laetitia Cesari, [2025 Global Counterspace Capabilities Report](#) (Secure World Foundation, 2025).
- <sup>6</sup> Béatrice Hainaut, “[NATO’s New Ambitions for Space](#),” *IFRI*, April 2024.
- <sup>7</sup> Ministry for the Armed Forces, [Space Defence Strategy](#) (Ministry for the Armed Forces, 25 July 2019); Secrétariat Général pour la Défense et la Sécurité Nationale [General Secretariat for Defence and National Security], [National Space Strategy 2025-2040](#) (Secrétariat Général pour la Défense et la Sécurité Nationale, 12 November 2025).
- <sup>8</sup> Clara Portela and Raúl González Muñoz, “[The EU Space Strategy for Security and Defence: Towards Strategic Autonomy?](#),” *SIPRI*, June 2023.
- <sup>9</sup> “[ESA Member States commit to largest contributions at Ministerial](#),” European Space Agency, 27 November 2025.
- <sup>10</sup> “[NATO’s approach to space](#),” NATO, 30 July 2025.
- <sup>11</sup> Matej Pretković, “[Europe’s Record €23 Billion ESA Budget: What It Means for the Future of Space](#),” *Cyclop SpaceTech*, 02 December 2025.
- <sup>12</sup> Mario Draghi, [The Future of European Competitiveness](#) (European Commission, September 2024).
- <sup>13</sup> “[Opening Address by Commissioner Kubilius at the 18th European Space Conference](#),” European Union, European Commission, 27 January 2026.

## ABOUT THE AUTHOR

### BÉATRICE HAINAUT

Dr Béatrice Hainaut is a Research Fellow at the Institute for Strategic Research (IRSEM) in Paris, specialising in outer space issues. She has held several space-related positions within the French Air and Space Force. Her current research focuses on the military uses of space and on competition over the electromagnetic spectrum.

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