Expanding National Ambition – Securing Swedish Space

Politea

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About the report

This publication is part of Politea's independent research initiative. It was produced without external funding or client commission, as part of our ongoing effort to advance strategic understanding of emerging geopolitical and technological trends.

This brief examines and explains the increasingly explicit security framing of Sweden's space sector and how national policy is evolving towards a more pronounced defence-oriented narrative. Sweden's space activities were once framed largely in terms of scientific research, commercial opportunity and international collaboration. They are now viewed through the lens of national security, resilience and strategic autonomy. This shift reflects wider geopolitical trends, as space is increasingly recognised as a contested and strategically vital domain. The analysis considers how Sweden is aligning its capabilities with those of its allies, particularly within NATO and the European Union, while also seeking to protect and develop sovereign capabilities. The brief highlights the tensions between maintaining open international collaboration and ensuring that space infrastructure and assets that are important for national security and expertise remain secure, resilient and under national control in an era of growing geopolitical uncertainty.

About Politea

Politea is an analysis company focusing on international political risk, geoeconomics, and technology, based in Stockholm, Sweden. With research, foresight, and strategy development, Politea helps companies and authorities to navigate in an increasingly turbulent environment and position themselves for the future.

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Executive summary

Sweden stands at a crossroads in its space policy. To remain competitive and strategically relevant, it must make the sector a higher level political priority and act swiftly to reinforce both its European and its national roles. As global competition intensifies, Sweden should leverage its unique assets – notably, Esrange and a strong industrial base – to position itself as a strategic hub within Europe's space ecosystem.

This will require dual action to expand outwards through deeper EU engagement and international partnerships, while at the same time building inwards to create a robust domestic market anchored in national security needs.

- Investments must shift from research alone to infrastructure, commercialisation and sovereign capabilities such as secure launches, national satellites and protected data networks.
- A stronger alignment is needed between government, industry and academia to provide resilience, ensure talent retention and protect technological sovereignty.
- By balancing cooperation with autonomy – especially vis-à-vis the United States – Sweden can safeguard its independence, strengthen its defence posture and ensure that its space ambitions contribute meaningfully to both national and European strategic goals.

Introduction

Sweden's space sector constitutes a notable part of the nation's industry. The country has a long-standing involvement in space exploration and development, which could become an indispensable resource for the EU. Sweden also maintains the EU's only mainland spaceport capable of launching satellites: the Esrange Space Centre. Sweden's vibrant space industry comprises large national companies such as SSC and OHB Sweden, as well as upcoming players such as AAC Clyde Space. Nonetheless, Sweden is often overshadowed by larger European space nations such as France, Italy and Germany.

Conflict and growing security concerns are influencing Sweden's military strategy and space sector. Sweden's accession to NATO represented an abandonment of neutrality and an acceptance of large-scale military cooperation. National researchers are highly aware of the risks of conflict in space. Sweden accepts that it is dependent on space and that satellite services are vulnerable to cyberattacks and ASATs.[1] The military also understands the potential for space to become an arena for conflict. The Swedish Armed Forces have identified intelligence threats involving foreign countries spying on the Swedish military

[1] FOI (2021), "Strategic Outlook 9 Future Threats", Link

using space systems to gain an information advantage over Sweden as especially concerning.[2]

Recent developments have proved that the EU is taking steps to develop more autonomous capabilities. The inauguration of Esrange's orbital launch site in January 2023 and comments by President of the European commission Ursula von der Leyen about the role of the spaceport in European security confirm the EU's attempts to break away from dependence on external partners. Swedish innovation is bolstering Europe's capabilities and making Sweden a potentially strong and leading collaborator in European defence.

Previous research has not addressed the ability of the EU to defend itself in case of conflict in space or how European nations are individually establishing their own space technologies. As the largest nations in the EU, the space programmes of France and Germany have naturally been singled out. Despite the existence of Esrange and its strong aerospace industry, Sweden has not been given particular attention. Companies such as SSC, Beyond Gravity and OHB Sweden are the largest of Sweden's traditional space industry actors. In addition, several innovative and growing companies are providing world leading technologies to a global market, not at least for defence purposes. Companies like the Satellite Communication provider Ovzon, which offers resilient satcom capabilities, and the space hardened microchips provider, Frontgrade Gaisler, have come on to the scene as new actors in the national sector.

Since its accession to the EU, Sweden has increasingly "Europeanised" its security policy and has projected its own interests on to wider EU security policy.[3] In addition, the recent reintroduction of conscription and Sweden's application to join NATO reflect a shedding of its policy of neutrality in favour of a more active participation in military alliances and a policy of national rearmament.

The Swedish National Space Agency (Rymdstyrelsen) is now led by Colonel Ella Carlsson, the former head of space systems for the Swedish Armed Forces. This is a notable signal beyond the country's borders that Sweden is expanding its conceptualisation of space and related activities to by bringing civil, military and governmental space entities closer together. The 2018 Strategy for Swedish Space Activities focuses on the use of space to support national security interests.[4] The strategy supports the alignment of space with national foreign, security and defence policy objectives alongside the development of national military capabilities. Esrange is singled out as a key national and European resource. While the importance of bolstering military space capabilities is acknowledged, however, the use of space by the Armed Forces and effective measures to support these activities are sadly absent.

[2] Försvarsmakten (2022), "Rymden – den nya frontlinjen", Link

[3] Aggestam and Hyde-Price (2016), "A Force for Good? Paradoxes of Swedish Military Activism", Link

[4] Ministry of Education and Research, Sweden (2019), "A strategy for Swedish space activities", Link

Sweden's Defence and Security Strategy for Space in 2024 expands the role of the country's space sector in security and defence.[5] It openly calls for a "security-based approach" and seeks to enhance Sweden's role as a credible space actor. To achieve this, Sweden must deepen its participation in various initiatives, such as space-based reconnaissance and surveillance, responsive launching and satellite communications in the Arctic region.

Concrete steps have been taken at the national and industrial levels to develop defence capabilities using space technologies. The launch of Sweden's first military test satellite, GNA-3, operated by the Swedish Armed Forces, marks the country's initial move to build national defence capacity in space.[6] The Armed Forces are also accelerating national space-defence efforts and aim to launch their own operational satellites ahead of the original target year of 2030, with the ambition to eventually conduct launches from Esrange.[7] Saab and ICEYE signed a Memorandum of Understanding to integrate ICEYE's space-based synthetic-aperture radar (SAR) data into Saab's command and control systems to boost situational awareness, decision making and multi-domain operations.[8] The Swedish defence industry is clearly taking note of the importance of space. However, it is looking to foreign companies that have developed strong and competitive space products and capabilities.

Sweden is aiming to become a more dynamic and important actor in the Arctic and Baltic regions and is actively seeking to bolster its commitment to the EU and NATO. This policy shift involves a clear stance on expanding the purview of space activities, cementing security and defence as a key goal for the nation, and an expansion of its international posture on the role that space can play in specific power dynamics.

The Swedish Space Industry at a Glance

Sweden has a technologically advanced and internationally engaged space sector. While not one of the largest in the world, the country has built a strong reputation in satellite technology, aerospace engineering, ground services and NewSpace innovation. The industry is supported by a mix of government agencies and private sector firms. Several companies play leading roles in the European and global space economy. The project AuroraSpace had identified 39 space companies operating in Sweden as of July 2025.[9]

[5] Ministry of Defence, Sweden (2024), "Sweden's defence and security strategy for space", Link

[6] Regeringskansliet (2025), "Sveriges första militära satellit nu uppskjuten i rymden", Link

[7] SVT (2025) "Sveriges rymdförsvar ska byggas snabbare – egna satelliter före 2030", Link

[8] Saab (2025), "Saab signs MoU with ICEYE to integrate advanced space-based radar data to military command systems", Link

[9] AuroraSpace, Link

Company	HQ	Year Est.	Description
Swedish Space Corporation (SSC)	Solna, Stockholm	1972	SSC is Sweden's largest and most prominent space organisation. The company provides a broad range of services, including satellite ground station operations, suborbital rocket launches and atmospheric research. Its most important asset is the Esrange Space Center, located near Kiruna in northern Sweden. Esrange is currently expanding to include facilities for launching small satellites into orbit. The SSC supports both civil and commercial space missions, working with leading agencies such as ESA, NASA and private sector satellite operators. It is a key provider of ground infrastructure for space communication and data acquisition globally.
OHB Sweden	Stockholm	2011	OHB Sweden originated from SSC as its former Satellite Division. Since 2012, it has been a subsidiary of the German space company OHB. It focuses on the development of satellite platforms, propulsion systems, and full satellite mission integration. The company has played a role in several ESA missions and contributes to Europe's capacity for autonomous space technology development. OHB Sweden's propulsion expertise also supports deep space and interplanetary missions. More recently, the company led the development of the Arctic Weather Satellite.
AAC Clyde Space	Uppsala	2019	AAC Clyde Space is an emerging player in the sector, with operations in the United Kingdom and the United States. The company specialises in small satellites and CubeSats, particularly for applications such as Earth observation, environmental monitoring, communications and Internet of Things. AAC Clyde Space offers full end-to-end services, from satellite manufacturing and launch coordination to mission operations and data delivery.
GKN Aerospace Sweden	Trollhättan	2012	GKN Aerospace Sweden is part of the global aerospace supplier GKN. The company is a major manufacturer of rocket propulsion components, such as engine nozzles, turbomachinery and structural parts. It is a long-term supplier to the Ariane launch vehicle programme, working in close cooperation with ESA and Airbus Defence and Space. GKN plays a role in European launch capabilities by delivering critical parts for space propulsion systems essential for satellite deployment.
Beyond Gravity	Göteborg	2009	Beyond Gravity, specialises in on-board satellite electronics, lightweight satellite structures and thermal insulation systems. The company provides hardware for a range of commercial and institutional missions, including those conducted by ESA. Beyond Gravity's components are widely used in satellite platforms and space vehicles.
Ovzon	Solna, Stockholm	2005	Ovzon Sweden AB is a public company, listed as Ovzon AB 2015. The company offers mission critical highly secured satellite communication service to military and civil customers with high demands on reliability, resiliency and security. The company launched its own satellite in 2024, taking geostationary satcom to a new level.
Frontgrade Gaisler	Göteborg	2001	Frontgrade Gaisler specialises in developing and delivering radiation hardened microchips for advanced space missions and space vehicles on the global market. Founded in 2001 as Gaisler Research, and now a part of the US Frontgrade group, it has a substantial proportion of the international market in its segment.

Strategic Direction

Atlantic Alignment: strengthening ties with the United States

Sweden remains dependent on European and especially US capabilities for its security and defence needs. The US is an important market for the Swedish space industry, but Sweden has increased its reliance on the US to secure its data and space capabilities. The countries signed a Space Situational Awareness sharing agreement in April 2022 and Sweden signed the Artemis Accords in April 2024. Minister of Education Mats Persson announced that this strengthened Sweden's "strategic space partnership with the US [in] areas such as Swedish space research and the space industry, which in turn also strengthens Sweden's total defence capability".[10] The visit by Chief of the US Space Force General B. Chance Saltzman to the Esrange Space Centre in November 2024 was a further indication of deepening relations between Sweden and the US on space defence cooperation.[11] General Saltzman's praise for the strategic location of Esrange makes Sweden a potentially key international player in US defence activities. Sweden is clearly hedging its bets on ensuring continuous access to US support and collaboration in the event of conflict arising in Europe, including in space. The adoption of a NATO and US-based approach to defensive capabilities and security in space demonstrates the country's reticence regarding the EU's space-related defence ambitions and activities.

The visit by Deputy Prime Minister Ebba Busch in January 2025 to the Consumer Electronics Show in Las Vegas involved the minister promoting the value of Swedish industry and technology. Busch also emphasised the vibrancy of Sweden's space sector and mentioned the value of Esrange as a launch site for international operators. The Minister for Energy, Business and Industry also visited the start-up Muon Space and, in an interview with Silicon Valley Nordic Beat, stressed that "We need to stop seeing space as just a research project—it is also something we can capitalize on".[12] These turns towards the US are hardly surprising given the country's history of looking across the Atlantic for security support and collaboration. Muon Space's ties to the US Space Force and the US Air Force are also a key indicator of Sweden's growing shift to viewing space as more than a field for research and science.[13]

As part of Sweden's ongoing efforts to enhance its strategic capabilities in space, Minister for Foreign Affairs Maria Malmer Stenergard signed a Technology Safeguards Agreement

[10] U.S. Space Command (2022), "USSPACECOM and Sweden sign a Space Situational Awareness sharing agreement", Link
Ministry of Education and Research, Sweden (2024), "Government signs Artemis Accords on space exploration", Link

[11] Swedish Space Corporation (2024), "U.S. Space Force Chief visited Esrange", Link

[12] Silicon Valley Nordic Beat (2025), "Minister in Silicon Valley to Market Space Tech", Link

[13] Muon Space, Link

(TSA) with the United States in June 2025.[14] This bilateral agreement, the result of five years of negotiations, facilitates the export of advanced US space technology to Sweden. The TSA is specifically designed to protect sensitive US space technologies while enabling their use on Swedish territory. A key outcome of the agreement is the ability of Sweden to use US launch systems for satellite missions launched from Swedish soil. The agreement also strengthens the framework for cooperation and information-sharing with US launch providers, which represents a significant advance for Sweden's space infrastructure in support of national security and defence objectives.

Yet, this deepening transatlantic cooperation also carries strategic risks. As Sweden – like other European states – grows more dependent on U.S. technology, data infrastructure, and cyber capabilities, concerns are mounting about vulnerabilities and the erosion of digital sovereignty. Balancing these dependencies with stronger European autonomy in space and digital domains is becoming an increasingly central challenge for Swedish policymakers.

Arctic Ambitions: Sweden's growing strategic role in the Arctic

As part of the Arctic 8, the group of states with territory within the Arctic Circle, Sweden maintains a role in the Arctic in relation to decision making and active operations. However, the country has one of the smallest territorial claims to be a major actor in the Arctic. While 15% of the country is within the Arctic Circle, Sweden lacks a coastline on the Arctic Sea.[15] Moreover, European Arctic initiatives and leadership have traditionally been undertaken by Norway. That said, the consolidation of ground stations and launch capabilities in Esrange will provide further impetus for the country to assert its role as an Arctic actor. Beyond the traditional narrative of supporting the environment, climate science and societal challenges in the Arctic, Sweden can further leverage its infrastructure to gain a role in the security and defence of Europe and in NATO. Sweden's Arctic Strategy of 2020, coupled with Sweden's Defence and Security Strategy for Space of 2024 assert the country's desire to become a key actor in the Arctic. The latter strategy openly expresses the country's ambition to be a player in the region for the EU and NATO through its space capabilities, notably by "contribut[ing] to NATO within space-based reconnaissance and surveillance, secure satellite communications in the Arctic, responsive launch of satellites and maritime situational awareness".[16]Esrange will become vital infrastructure for national, European and NATO activities and, in case of conflict, would be likely to feature as a key target for cyber and electronic warfare, as well as potential kinetic attacks. In the context of NATO, Sweden is also part of the NORTHLINK project, which focuses on Arctic satellite communications capability.[17] Sweden has a real opportunity to be a leading partner in

[14] Ministry of Education and Research, Ministry for Foreign Affairs, Sweden (2025), "Sweden signs agreement with US on advanced space technology", Link

[15] Arctic Portal, "Sweden", Link

[16] Ministry of Defence, Sweden (2024), "Sweden's defence and security strategy for space", Link

[17] NATO (2025), "NATO's approach to space", Link

NATO through this project, promoting its industrial competence and further establishing its connection to the region.

Sweden's leading role through OHB Sweden in the design and development of the Arctic Weather Satellite highlights its increasing involvement in Arctic activities. The location of Esrange in the Arctic Circle and the SSC's global network of ground terminals, several of which are in the region, demonstrate the country's vast resources and entrenchment in the Arctic. This vital infrastructure and its systems are highly susceptible to interference and even direct attack. Sweden should pursue a more outspoken and security-driven approach to the Arctic. While strides are being made, the country still exhibits a tendency to focus on the region in the frame of environmental and sociological concerns, even if an increased military and civil defence ambition is becoming more apparent, not least as a viable partner in NATO.

When it comes to Nordic cooperation, Sweden is collaborating with Denmark on the Bifrost demonstrator satellite, which launched on 25 June 2025.[18] The satellite has been designed to enhance situational awareness by providing space-based surveillance, target identification and real-time event reporting in the North Atlantic and the Arctic. The satellite was developed by Space Inventor, with support from Terma, Gatehouse Satcom, DTU and Unipab Space Solutions. It was financially supported by the Danish Defence Acquisition and Logistics Organisation (DALO) and the Swedish Defence Materiel Administration (FMV). This represents another key step in industrial and institutional support for joint Nordic space systems, with the Arctic increasingly becoming a focus.

NORDEFCO could become a key pillar in support of Nordic defence operations. In 2025, the Nordic defence ministers signed a revised Memorandum of Understanding on NORDEFCO, committing to strengthen and deepen defence cooperation.[19] The 2021 NORDEFCO Annual Report identifies space as a priority area within Emerging and Disruptive Technologies (EDT), and Satellite Communication (SATCOM) as a potential field for enhanced Nordic cooperation.[20] The report also notes Norway's leadership in the Arctic Satellite Broadband Mission (ASBM) and the follow-on HEO2 project, both of which are presented as potential platforms for strengthened civil-military collaboration in the region. NORDEFCO is a notable avenue for strengthening space cooperation. Sweden has yet to market itself as a potential actor or collaborator in the region. While the Defence and Security Strategy for Space openly commits to strengthen ties with NORDEFCO and use the group as a conduit for further space activities, Sweden needs to leverage its potential and its infrastructure capabilities to support NORDEFCO.

[18] SpaceNews (2025), "Space Inventor Launches First Danish Arctic Satellite"", Link

[19] High North News (2025), "Nordic Defense Ministers Met in Lapland: Updated NORDEFCO With New Agreement", Link

[20] NORDEFCO (2021), "NORDEFCO Annual Report 2021", Link

Brussels Calling: Sweden's place in the EU

European interests remain a top national priority. In its 2024 Space Strategy, Sweden reaffirms its commitment to Europe while also emphasising transatlantic cooperation with the United States. By explicitly stating that it could invoke the mutual assistance clause under Article 42.7 of the Treaty on the Functioning of the European Union in response to a space-related attack on Swedish territory, Sweden has signalled both its trust in the EU and its allies, and its recognition that space incidents and conflicts warrant collective defence.[21]

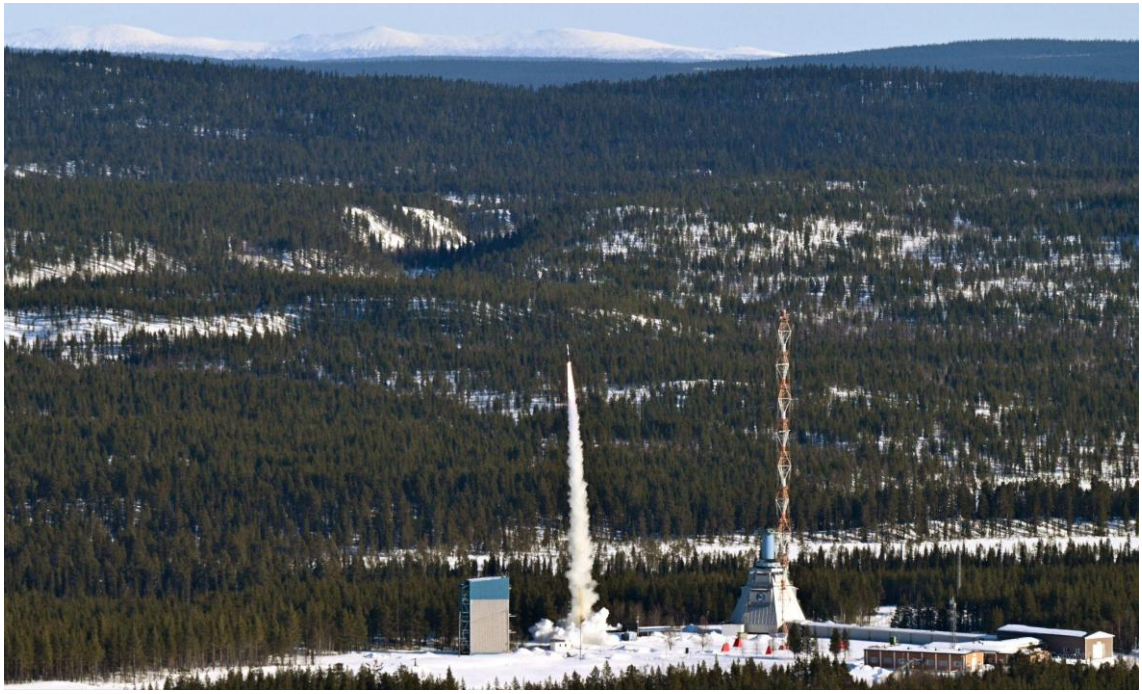
Sweden does not just talk about its participation in EU frameworks and initiatives. Sweden is an active member of the EU Space Surveillance and Tracking (SST) Partnership. The Defence and Security Strategy for Space signals Sweden's intention to build an integrated space domain awareness (SDA) capability by deepening cooperation on EU SST, while maximising efficiency through dual-use approaches that merge civil, commercial and defence resources. Several national companies are also involved in European Defence Fund (EDF) space projects, such as OHB Sweden within SPIDER, Vimotek AB in BODYGUARD and the SSC in EMISSARY. Participation in these projects shows that the country is helping to shape future European defence space capabilities, and also reflects strong national industrial and technological expertise and alignment with EU space-defence priorities. However, it is important to remember that while EDF projects are key to supporting knowledge transfer and for directing the strategic vision of European space projects, their focus is on R&D that primarily benefits small and medium-sized enterprises (SMEs). If the country wants to bolster national capabilities, mutually beneficial contracts and direct projects with other countries or companies would be quicker and produce better results for specific national needs.

The Trump administration's rejection of internationalism and belligerent stance towards Europe has sounded alarm bells in the corridors of the EU's leading institutions. The European Commissioner for Defence and Space, Andrius Kubilius, has remarked that: "We've lost (in) competition to, let's say, Elon Musk … and definitely we need to have our (own) autonomous launching possibilities".[22] As Europe seeks to further its autonomous capabilities, Sweden is emerging as a key player in securing independent access to space for the EU. The 2023 inauguration of the Esrange Space Center as the EU mainland's first orbital launch site marked a turning point not just for Sweden, but for the EU's broader ambitions for space autonomy. Commission President Ursula Von der Leyen's presence was confirmation of the EU's understanding of the value of Swedish infrastructure to the bloc's space sector. Esrange symbolises Sweden's growing role in reducing Europe's dependency on foreign launch providers. However, collaboration with Brussels is not without friction. In March 2025, Sweden and Finland submitted a joint non-paper to the European Commission and the EU Member States, raising concerns over the direction of

[21] Ministry of Defence, Sweden (2024), "Sweden's defence and security strategy for space", Link

[22] Reuters (2025), "Europe looks to Nordic space race to scale back US dependence", Link

the proposed EU Space Act.[23] The document criticised superfluous regulation and advocated for a more strategic approach that prioritises innovation, public-private investment and national discretion in security- and defence-related affairs. As space technologies increasingly serve dual-use purposes in civilian and defence contexts, Sweden argues that Member States must retain control of their national space operations.



Esrange, photo credit SSC

Esrange: Sweden's gateway to space

Strategic and military importance

Mainland Europe is not short of initiatives focused on establishing capable launch centres, but the Esrange Space Centre stands out among the rest. Located in Kiruna, in northern Sweden, Esrange was founded in the early 1960s, primarily to launch sounding rockets and high-altitude balloons to conduct atmospheric scientific research.[24] The Esrange facility is currently operated by the SSC. Although other EU member states, such as Portugal in the Azores, as well as Italy and Germany, are looking into building and developing spaceports, Esrange is the only fully developed spaceport on EU mainland soil. The recent agreements with Perigee on the Blue Whale Launcher and with the Firefly on its launchers has seen the spaceport diversify its portfolio. Esrange is becoming an asset for international commercial companies to test small launchers, such as the Themis project launch vehicle. However,

[23] Space Finland (2025), "Non-paper March 2025 by Finland and Sweden Potential EU Space Act", Link

[24] CSIS (2019), "Spaceports of the World", Link

there is competition from Norway's Andøya Spaceport, and media reports suggest that Norway is seeking to slow down or even stop Swedish launches.[25] Sweden intends to expand its capabilities and to launch satellites into orbit by crossing Norwegian airspace, which presents a notable political challenge. Protecting domestic interests and security are persistent questions for Norway. Both countries are addressing the issue, and the Swedish ambassador has raised the subject of launches at a meeting with the Norwegian Foreign Ministry as part of ongoing governmental negotiations. Sweden is approaching the topic with great care. Ensuring cordial relations between both countries is essential to allowing Sweden to expand its capabilities and provide Europe with avenues for launch opportunities.

The spaceport primarily serves civilian functions. However, the country's military has recognised the importance of Esrange to national security. The Swedish Armed Forces outlined in a 2022 Perspective Study that among their core aims for space capacity were the ability to launch satellites from Esrange, and to mobilise key individuals and assets at Esrange in case of conflict.[26] The spaceport represents an indispensable asset to the military. The Armed Forces have openly referenced a desire to use the spaceport to support national launch and responsive launch capabilities. Self-reliance is seemingly the goal with a hint of the traditional Swedish concept of total defence, or organising the people in the country's defence. Esrange therefore plays an important role in enabling Sweden to defend itself at a time of possible isolation.

Esrange's location and geopolitical importance are key to how it distinguishes itself from competitors. Esrange is located within the EU and on the European continent, and is well-connected to Swedish and international industry. The spaceport also has good logistical routes to Kiruna, as well as full access to national services, which contribute to the location's benefits. This position could support more economic working practices, faster delivery and better connection times between European nations and production centres, as well as access to production facilities and research complexes.

Having such a spaceport on the European continent could act as a display of force to nearby threats and would show that the EU has the capacity to diversify its space launches. Esrange is still small in comparison to the Guiana Space Centre and has limited launch capacities. The spaceport's location above the Arctic Circle means that its capabilities are mainly suited for Low Earth Orbit (LEO), especially polar sun-synchronous, launches. This restricts Esrange's launch capabilities, which in turn constrains Sweden's abilities within Europe, although Sweden could use this to its advantage by specialising and tailoring its services to the above-mentioned launch types.

Nonetheless, it provides avenues for the EU to enhance its defence capabilities. The EU could profit from diversifying from the Guiana Space Centre and being able to split its

[25] Dagens Nyheter (2025), "Kampen om rymden – Norge vill stoppa svenska uppskjutningar", Link

[26] Försvarsmakten (2022), "Slutredovisning av Försvarsmaktens Perspektivstudie 2022 – ett starkare försvar för en utmanande framtid", Link

launches with Kiruna, allowing both a greater degree of resilience and a greater number of launches per year, alleviating pressure on Guiana and the Ariane launchers to keep up with demand.

Esrange's launch capabilities have wider implications for the EU. A spaceport on European soil reduces reliance on other nations for assistance with launching satellites and other technologies. Von der Leyen has recognised that Esrange "offers an independent European gateway to space" and the EU has called Esrange an essential factor in future EU space endeavours.[27]

Finally, its neighbouring airspace complicates the issue. While friendly nations such as Norway and Finland directly border Sweden, in addition to other EU member states which share maritime borders, Russia's poses a considerable problem. The same concerns regarding Russian responses and countermeasures that were present during the 1960s persist today: from taunting Sweden by entering its airspace to jamming attacks or even more aggressive potential actions, such as shooting down European satellite launches from Esrange. However, it is important to note that these challenges are not exclusive to Esrange. They also affect regional spaceports and infrastructure, such as Andøya. For both nations, NATO membership is important for coping with these problems and sharing best practices on withstanding future threats.

International and Commercial Opportunities

Esrange is an important asset for the EU, but it is important to understand that the EU cannot totally rely on the spaceport for all its launch needs. When the orbital launch site at Esrange was inaugurated in January 2023, the first satellite launch was originally planned for May 2024. Preparations are continuing for the launch and Esrange is said to be ready in terms of infrastructure preparedness and set-up. However, plans for the launch are dependent on the rockets that are being developed to be tested at the site.

Andøya, which was visited by a NATO delegation in July 2025, has a licence for up to 30 launches annually, positioning itself as a significant asset for NATO operations.[28] Esrange does not have a fixed launch target, but will also play an important role in meeting NATO's growing need for rapid launch capacity. To maintain its relevance and competitiveness, however, Esrange must actively pursue agreements and partnerships with NATO and other strategic actors. With May 2024 as the first launch window and still no launches conducted as of November 2025, Esrange needs to become more proactive in its approach if it is to avoid losing out on contracts and future launch opportunities. Without such engagement, there is a risk that Sweden could miss valuable opportunities, ceding ground to competitors that are more proactive in securing these roles within NATO's space capabilities.

[27] Swedish Space Corporation (2023), "Mainland EU's first orbital launch site inaugurated", Link

[28] Reuters (2025), "Europe looks to Nordic space race to scale back US dependence", Link

The SSC operates one of the world's largest civilian networks of ground stations and "provides communications links for satellite control, launch support, payload data services and teleports".[29] The SSC's global network of ground stations comprises sites in Sweden, Canada, the USA, Chile, Australia and Thailand. This worldwide reach, with stations in the Northern and Southern Hemispheres, provides round-the-clock connectivity. Should the Swedish Armed Forces or other European defence forces wish to access their satellites, the SSC would be able to provide a truly global range, which increases capabilities for surveillance activities and intelligence operations. Esrange's global connectivity inevitably broadens Sweden's, and by association the EU's, global reach by having access to such extensive international connectivity. From an EU perspective, this would give it eyes around the world and intercontinental satellite operability. These ground stations could be transformed from stations receiving data from space to assets for electronic intelligence or warfare. However, this would have various legal implications in the countries where these stations are found.

There would be potential legal advantages for commercial companies in the EU to launch from Esrange, which would support Swedish economic growth through the provision of space services. Its NATO membership further simplifies the diversification of launches between Sweden, Norway and the UK, and thus supports increased NATO resilience in the event of conflict. Enabling launches from diverse spaceports supports NATO's infrastructural integrity.

Policy Recommendations

The Swedish space sector, where industrial actors already run most of their activities and revenue-streams from outside Sweden, should be given a higher level of government priority, with an emphasis on helping to expand activities beyond national borders and engaging more proactively in regional initiatives. Sweden can position itself as a strategic launchpad for broader EU space activities, strengthening its role within Europe's space ecosystem. This outward-looking approach should be complemented with a detailed operational plan for integrating Esrange into national military structures and frameworks in the event of a national crisis, ensuring that this critical asset can serve both civil and defence purposes when required. However, if Sweden wants to realise the ambitions set in its space strategies and contribute more to continental initiatives and security matters, the country needs to act quickly to avoid Esrange falling behind rising stars in Europe, mainly in the UK and Norway.

At the same time, Sweden should work to reorient more national space companies towards meeting domestic needs for greater autonomous capabilities. Many Swedish space firms remain focused on international markets. The government and national security actors should act as stronger anchors to create a stable and strategic home market. By increasing

[29] Swedish Space Corporation (2018), "Your Partner for Advanced Space Services", Link

domestic procurement and enabling more opportunities for Swedish companies to sell their products and services nationally, Sweden can strengthen its space industry base, bolster resilience and ensure that the sector is aligned with national security and strategic priorities. Examples such as the recent investment by the Finnish Defence Forces in ICEYE for defence systems are the right way forward to support and bolster national companies and ensure output of consistent quality.[30]

Swedish entrepreneurs in the space domain have voiced their dissatisfaction with the lack of investment in the commercialisation of space products.[31] Investing in education and research, while laudable and important in their own right, are not enough to support the national space sector and the government's own commitments and drive to bolster domestic capabilities. Sweden must invest in resilient infrastructure such as secure launch facilities, sovereign satellite systems, national satellite communications capability and protected data networks; in ensuring a strong, consistent political commitment to safeguarding strategic capabilities; and in fostering partnerships between government, industry and academia to develop technologies that serve both civilian and defence needs. By integrating security considerations with commercial and scientific ambitions, Sweden can protect its strategic autonomy and strengthen its role in the global space economy.

Experts also worry that the current and historical focus on research is pushing young talent abroad in search of better professional opportunities. This poses a threat to national security, not only as a brain drain within the space sector, but also regarding the survival of small, innovative space companies that provide new, modern space technologies. Their loss would inevitably weaken the country's ability to maintain and leverage its own capabilities, and to contribute meaningfully to Europe as an independent actor.

The country should approach continued collaboration with the United States with a consistent focus on European interests and the preservation of autonomous capabilities. While transatlantic partnerships are still valuable, Sweden must guard against over-reliance on foreign suppliers and operators, particularly in a sector so closely tied to national security. Turbulent political administrations and unpredictable private sector actors, such as high-profile entrepreneurs with global reach who can alter priorities with little warning, could leave Swedish industry and security exposed. By maintaining strong European partnerships and investing in sovereign capabilities, Sweden can ensure that its space sector remains resilient and strategically independent, regardless of shifts in external relationships.

Sweden already possesses significant space-related assets beyond Esrange, in areas such as advanced sensors, satellite communications and ground stations, that contribute to international initiatives such as the EU SST. Moreover, Sweden has a dynamic ecosystem of companies and research institutes, as well as defence firms such as Saab that are re-engaging in space activities, while also leveraging their ability and expertise to integrate

[30] European Spaceflight, "Finnish Defence Forces Award ICEYE €158M Contract for SAR Satellites", Link

[31] EFN (2025), " Rymden expanderar – men hänger Sverige med?", Link

space into all levels of defence systems. As new and more modern concepts of warfare emerge, from Multi-Domain Operations and the use of unmanned assets, a reliable space capability is essential to stay connected and to gather and transfer information within extremely short timeframes. Sweden does not lack the technologies, skills and companies to engage directly with these new realities.

These capabilities form a strong foundation for commercial growth and national security. To maximise their impact, Sweden should more actively publicise and promote these assets, foster public awareness of their strategic value and provide support through contractual obligations to allow opportunities to be realised inside Sweden. Building a national culture that recognises the importance of existing infrastructure will help to mobilise support, attract investment and accelerate the development of sovereign space capabilities.

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