



Europe's GEOINT landscape

Challenges & Emerging solutions

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Geospatial World Forum
30 April 2026 Amsterdam

GEOINT and Geopolitics

GEOINT has become a **decisive enabler of geopolitical and military power**. Space has become a **highly contested domain**.

Russia's war against Ukraine has demonstrated the strategic value of space-based ISR for situational awareness, force movements tracking, targeting, etc.

Europe is rapidly **scaling its space industry**, including an **expanding military and dual-use ISR** and communication systems

→ **Result: Europe's GEOINT paradox**: Despite sizeable European satellite assets, Europe remains dependent on external actors & U.S. intelligence architecture for high-end, real-time, military ISR and targeting support.

Fragmented governance

Multiple actors: Member States, NATO, ESA, EU Satellite Centre, private sector

No unified European GEOINT regulatory framework. Limited EU competencies in the area of space defence..

Diverging national regulations across Member States create inconsistencies in standards, procedures, and oversight of all space-related activities.

Diverging data-sharing policies, security classifications, technological capabilities, tasking priorities

→ **Result: Loose coordination of GEOINT assets** on the European level. **Barriers to data sharing and interoperability** due to differing legal regulations and restrictions.

Contested space environment

Growing threats to space

assets: jamming, spoofing, cyberattacks, and kinetic risks (debris, ASAT testing)

Increased vulnerability of ISR and other space-based systems: disruption can degrade navigation, targeting, and intelligence flows

→ **Result: Need for resilience and protection:** redundancy, hardening, and space domain awareness are becoming strategic priorities.

Emerging EU regulations & initiatives

EU Space Act: Harmonizes rules for space activities across Member States, aiming to reduce regulatory fragmentation and improve safety, resilience, and sustainability.

European Space Shield: Seeks to strengthen Europe's ability to detect, track, and respond to space threats, including jamming, spoofing, and hostile activity in orbit.

IRIS²: Builds a sovereign EU satellite constellation to provide secure communications and reduce dependence on non-European systems.

EU Earth Observation Governmental Service (EOGS): a secure EU service providing EU agencies and Member States with priority satellite-based intelligence for defence, security and crisis response (proposed for the next MFF: 2028-2034)

Conclusion

Europe has the building blocks of a credible GEOINT capability, but **fragmented governance, regulatory barriers, and limited political willingness** to back more robust European solutions continue to constrain effectiveness.

EU initiatives are a step in the right direction, but they require **more ambitious and sustained funding**, particularly the EU Space Shield.

National initiatives need a stronger European dimension. GEOINT capabilities will continue to emerge at national level, as illustrated by Germany's SATCOM Stage 4, but they should be designed with a **more tangible European dimension from the outset**.