CEAFE — Centro de Estudios y Análisis sobre el Futuro de Europa

DEFENCE INDUSTRY

Monday, 16 November 2026 · 13:30

- **Section:** Defence Industry / Industria de Defensa
- **Window covered:** Monday 16 November 2026, 05:45 to 12:00 Europe/Madrid (list posts read back to the last post seen by the 07:30 run)
- **Compiled from:** the CEAFE Defence Industry section brief, the shared logs and @F_CEAFE posts.

Sovereign military software: Europe looks for Palantir alternatives

Reuters (Berlin, 16 Nov) reports that European defence ministries are trying to reduce their dependence on Palantir's Maven Smart System, and that a growing number of European firms are competing for the business.

Germany has a shortlist of a handful of solutions that does not include Palantir; a person familiar with it said they would not match Palantir but would be "good enough", keep data sovereign and reach about 80% of requirements within a year. France's procurement agency (DGA) is building a sovereign platform, **Arcadia**, with several suppliers: contracts by year-end and a field version by mid-2027 (deputy head Alexandre Lahousse). The Netherlands uses some Palantir software but wants a European alternative within two years; procurement minister Derk Boswijk said European AI know-how is "very fragmented". Helsing unveiled **Clarity** on 11 November ("developed and built in Europe, under European control", running on customer-owned infrastructure) and offers an initial version to the Bundeswehr's Lithuania brigade within months. Systematic (Denmark, SitaWare), Thales, Safran and Comand AI are also competing. Palantir says its NATO system has no "kill switch"; NATO's SACEUR, Gen. Grynkewich, praised Maven this summer. @F_CEAFE posted the story this morning.

Note for the compiler: the Economía 13:30 brief also carries this story (its topic 5). Suggested primary section: Defence Industry, with a cross-reference in Economy.

Why it matters for Europe. This is the kill-switch and data-sovereignty argument applied to the software layer that now decides targeting. Reuters links the concern to the Starlink speed restrictions that hampered Ukraine's drone interception last month. The weak point is Boswijk's: Germany, France and the Netherlands are each building a national answer. A single European platform (EDF/EDIP funding, a common procurement through EDA or OCCAR) would give European firms the scale Palantir has in the US market, where Pentagon software must be American-controlled.

What to watch. DGA Arcadia awards (by end-2026); the German shortlist decision; whether the Netherlands joins a German or French solution.

Sources

- @Reuters
- @F_CEAFE
- channelnewsasia.com
- helsing.ai

ICEYE unveils Gen5: an 11 cm, ITAR-free European radar satellite

Finland's ICEYE announced its fifth-generation SAR satellite on 16 November, "the sharpest commercially built" according to the company.

For government customers it images with 1,800 MHz bandwidth and resolution as fine as 11 cm (subject to ITU compliance); all customers get 1,200 MHz and 16 cm. Image window separation is cut by more than 30%, imaging time per orbit is twice that of earlier ICEYE satellites, and an on-board AI processor will allow screening and tip-and-cue in orbit. ICEYE says new customers can have a "fully sovereign Gen5 system, free of ITAR restrictions, operational within 12 months of signing", including ground segment and training. It describes itself as "natively European, founded in Finland", with over 1,500 employees. Bloomberg covered the launch.

Why it matters for Europe. A European firm is now selling a sovereign, ITAR-free military surveillance constellation, exactly the capability CEAFE argues Europe should buy from itself rather than from US providers. ICEYE satellites are also the target of Russian proximity operations (Kosmos 2612 near ICEYE-X36 in October; sibling satellites drifting towards ICEYE-X37, per the Conflictos log in shared/space.md), which shows how central they have become to European and Ukrainian intelligence.

What to watch. first Gen5 launch date and launcher (European or US); government customers.

Sources

- X post 2122239297046655152
- ICEYE press release
- Bloomberg
- paywalled; headline onl

Türkiye: ASELSAN signs €1.28bn with ROKETSAN for missile seekers and data links

ASELSAN told Borsa Istanbul's disclosure platform (KAP) on 16 November that it signed contracts worth €1,281,101,744 with ROKETSAN for the supply of missile data-link and seeker-head systems.

ROKETSAN accounted for 5.6% of ASELSAN's net sales and 7.3% of its trade receivables in the latest statements. The filing gives no delivery schedule, number of contracts or missile programmes. It follows a €1.234bn ASELSAN–ROKETSAN contract for air-defence subcomponents disclosed on 23 September 2026 (icwwm.com). The same morning ROKETSAN promoted its long-range KARA ATMACA cruise missile and ASELSAN its TOLUN glide-bomb family.

Why it matters for Europe. Türkiye keeps the most valuable parts of a missile (the seeker and the data link) inside its own industry, in two large contracts within two months. Europe has the equivalent firms (MBDA, Diehl, Thales, Leonardo, Kongsberg, Saab), but many European air-defence buyers still import complete US systems. Türkiye's model of national champions supplying each other is a benchmark for European vertical integration at EU scale.

What to watch. which programmes (HİSAR/SİPER air defence, ATMACA, ÇAKIR, TAYFUN) the seekers are for.

Sources

- X post 2122260435806179488
- borsatek.com
- cnbce.com
- icwwm.com
- X post 2122268252403376221
- X post 2122246344819528087

European tech sovereignty: TeQuantS quantum links and a Nordic-Baltic AI gigafactory bid

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- **Thales Alenia Space** (Thales 67%, Leonardo 33%) signed two contract amendments with ESA as prime of **TeQuantS**, under ESA's ARTES programme with CNES support. The new phase sets up a quantum laboratory at CNES to test an entangled-photon source, satellite–ground time synchronisation and ground photon detection, towards the **QINSAT** satellite, which will demonstrate entangled-photon transmission between space and Earth. Partners include Airbus Defence and Space, AUREA Technology, Bertin, OGS Technologies, SIGMAWORKS and two French labs. The release cites government users exchanging information "in a resilient and sovereign manner".
- **Nokia** leads **AI Gigafactory Northern** with Nscale, Telia, Verda and Skeleton: a federated AI infrastructure across Finland, Estonia, Latvia and Sweden combining compute, sovereign cloud, connectivity and decarbonised energy, to bid in the EuroHPC Joint Undertaking's AI Gigafactory tender.

Why it matters for Europe. Both are positive examples of the line: European primes, start-ups and labs working together under ESA and EU programmes on technologies (quantum-secure links, sovereign AI compute) that the defence sector will depend on. CEAFE's caution from the SABRE case applies: ESA/EU-

funded IP should carry ownership-retention clauses so it stays in Europe.

Sources

- X post 2122277427774984491
- thalesaleniaspace.com
- X post 2122251865190449401
- nokia.com
- teliacompany.com

Update: Vulcan failure traced to the Centaur upper stage, Space Force decision on national-security launches pending

New since the 07:30 brief: reporting now places the anomaly in the Centaur V upper stage near the end of its burn, with the solid boosters (redesigned nozzles) and the BE-4 first stage performing normally (DW; Spaceflight Now; Behind the Black).

ULA and the customer are investigating. The Space Force had paused Vulcan national-security missions after the February nozzle failure and wanted data from this flight before deciding; that decision is now further away (Spaceflight Now, DW). Reuters and DW stress it was ULA's first outright failure since 2006. (See 07:30 brief, topic 6.)

Why it matters for Europe. With Vulcan and New Glenn both grounded, Amazon's 24 Ariane 6 launches and Europe's own institutional missions depend on Ariane 6 cadence; a reliable European launcher is a commercial and strategic asset while US alternatives other than SpaceX falter.

Sources

- @Reuters
- dw.com
- spaceflightnow.com
- behindtheblack.com

Industry round-up: Poland's GLADIUS in service, Airbus helicopters for the Marine Nationale, L3Harris under FAA scrutiny

WB Group (Poland): its GLADIUS reconnaissance-strike system (loitering munitions with its own reconnaissance and command chain) is becoming routine in the 14th Suwałki Anti-Tank Regiment of the 16th Mechanised Division, according to the company.

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- **Airbus Helicopters** marked the French Navy's 400th anniversary, flying alongside the Marine Nationale (European platform in European service).
- **L3Harris (US):** the FAA is investigating whether a router installed by contractor L3Harris during copper-to-fibre work in El Dorado, Arkansas, flooded the air-traffic-control network and triggered last week's nationwide ground stop; about 60–69 similar routers had broadcasting disabled while tests continue (USA Today, 14 Nov; ABC News). Not covered in earlier briefs.
- **Elbit Systems (Israel)** is marketing its space electro-optics at Space Tech Expo (company post). Israeli space optics competes with European suppliers for European EO satellites.

Sources

- X post 2122268438878171138
- X post 2122271202869682474
- usatoday.com
- abcnews.com
- X post 2122257507271802947

See also

- UK–EU summit on 20 November with a defence commitment, but no SAFE entry yet — see World.
