



sopra  steria

BEHIND EVERY SOVEREIGN DECISION

DEFENCE, SECURITY & SPACE

Digest

EUROSATORY 2026



The war of saturation

Sopra Steria and its subsidiary CS Group present the 10 trends reshaping European defence.

Monitoring & managing information overload



TREND 01.

Information warfare

TREND 02.

Counter-drone warfare

TREND 03.

Space sovereignty

TREND 04.

Multi-domain operations

Acting faster than the adversary



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Rearmament and stockpiles

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Mass drone deployment

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New innovation models

EDITORIAL



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At the opening of Eurosatory 2026, one observation stands out: for thirty years, we built our power around expensive, exceptional platforms designed to last. Today, in Ukraine and the Levant, drones worth thousands of euros are destroying multi-million-euro tanks. Software updated in weeks is outperforming systems designed for decades. Strategic value has shifted.

This shift calls for a European response. Not to copy the American model or match Chinese scale, but to build our own path: a defence industry capable of combining the depth of major programmes – aircraft carriers, submarines, satellites – with the agility of short software cycles. This requires massive investment, but above all smart investment: in data, sovereign AI, allied

data spaces, and industrial capacity for intelligent mass production.

At Sopra Steria, we believe one thing: European strategic autonomy will not emerge as a by-product of parallel investments. It will be built through the connection of systems, data, and actors – through interoperability, digital sovereignty, and trust. This is exactly what we do every day, alongside armed forces, agencies, and European industrial players.

This document presents ten trends. They are not forecasts: they describe what is already happening. The only remaining question is tempo.

**“Speed is the new
superiority.”**

PILLAR 01.

MONITORING & MANAGING INFORMATION OVERLOAD

Before the fight:
the battle of narratives.

TREND 01.

The credibility of states has become a strategic target. War is won – or lost – in the cognitive domain even before it begins.

Social networks, deepfakes, micro-targeting: amplified by generative AI, information campaigns now produce strategic effects at marginal cost, under the cover of plausible deniability. Nearly 20,000 cases of pro-Kremlin disinformation have been identified in Europe. If armies win battles, nations win wars.

↳ *The Sopra Steria perspective*

With the **SENSEE platform, the Somulator simulation tool (deployed by the Norwegian Armed Forces), and the Cercle Pégase think tank, Sopra Steria is federating a French industrial ecosystem to detect, characterise, and respond to information-based attacks.**

\$417bn

Annual global economic cost of disinformation – equivalent to 15% of France's 2024 GDP.

x20

Cost gap between a strike drone and the missile used to intercept it.

When a €30,000 drone challenges a €600,000 missile.

TREND 02.

Saturation through mixed swarms has inverted the economic equation of air defense. The weak link is no longer interception, but the cost/effect ratio.

A Russian Geran-2 drone, produced at a rate of over 5,000 units per month, costs 20 times less than a MICA missile.

The response is being organised as a system of systems: distributed sensors, multi-sensor fusion, interoperable layered effectors – from Aster missiles to lasers, including electronic warfare. This is the logic behind the European Air Shield project led by the European Commission.

↳ *The Sopra Steria perspective*

Sopra Steria's C2 BOREADES system, ITAR-free and sensor-agnostic, orchestrates the full counter-UAS kill chain – from detection to neutralisation. It has already proven its effectiveness during the Paris 2024 Olympic Games.

20%

Share of UK GDP linked to satellite services.

Space: a new front – and a new fault line for European sovereignty.

TREND 03.

Jamming, cyberattacks, anti-satellite weapons: space has become a full-fledged domain of conflict – and a silent backbone of modern economies.

Nearly 20% of the UK's GDP is tied to satellite services; a GPS outage would cost its economy £1 billion per day. Europe is accelerating: the ERS programme (€1.2 billion), the European space shield targeted for 2030, the scaling-up of IRIS,² and Germany's SATCOM Bw initiative (€8-10 billion). Without space situational awareness, there is no sovereignty.

↳ *The Sopra Steria perspective*

Sopra Steria is developing the concept of a virtual constellation (GOSMIC product line) and operates for CNES the national space traffic management system STREAMS.

Multi-domain operations: decisions are now made in minutes, not hours.

TREND 04.

Kill chains are collapsing into extreme time compression. Land, sea, air, cyber, space, electromagnetic and informational domains are now fully synchronised in near real time.

Detecting via drone, striking with artillery, assessing damage, and retasking within minutes is now routine on the Ukrainian and Iranian fronts. This agility depends on reliable access to tactical data – and therefore on the security of dual-use digital infrastructures (data centres, undersea cables), now considered priority targets.

↳ *The Sopra Steria perspective*

CENTERIS, Sopra Steria's multi-domain hypervisor compatible with NATO standards (Link 16), integrates ISR, drone management and data-centric security – enabling coordination between military forces and dual-use infrastructures.

JUST A FEW MINUTES

Duration of OODA loops observed in contemporary operational theatres.

PILLAR 02.

ACTING FASTER THAN THE ADVERSARY

AI for defence: sovereign
or dependent.

TREND 05.

While Washington and Beijing are investing massively, Europe is at stake in maintaining independent armed forces.

France is creating AMIAD (€2bn by 2030), the UK its DAIC. Saab is investing in Helsing, Dassault Aviation in Harmattan AI. But military AI imposes unique requirements: explainability, edge and far-edge deployment, rapid retraining. A non-negotiable principle: AI recommends, humans decide.

€2bn

France's announced investment
in defence AI by 2030.

↳ The Sopra Steria perspective

A founding member of the ETA (European Trustworthy AI Association) alongside Thales and IRT SystemX, Sopra Steria provides a sovereign AI infrastructure – the InnerData MLOps platform and the IAKa solution for critical environments.

Data: the new frontline — and new sovereignty boundary.

TREND 06.

Without allied data sharing, there are no multi-domain operations. Without sovereignty, there is no acceptable sharing. The European challenge can be expressed as a single equation.

Twelve NATO countries have been participating since 2025 in the ACE programme (Allied Cloud Environment). The European Defence Agency is laying the foundations of the DAIDS data space. Digital infrastructures are the primary target of cybercrime in Europe. The response: data-centric security — protecting the data itself, not just the network.

↳ *The Sopra Steria perspective*

Sopra Steria is introducing data-centric security into the defence data space led by the EDA. The group is among the first European integrators of OVHcloud's On-Prem Cloud Platform — including air-gapped environments.

13.7%

Share of European cybercrime targeting digital infrastructures and services.

\$1–3bn

Current market for defence quantum technologies — projected to reach \$10bn by 2030-2035.

Quantum: not a distant horizon, but an operational lever.

TREND 07.

GPS-free navigation, novel detection capabilities, post-quantum encryption: quantum is moving from promise to practical use. And it opens a critical vulnerability: “harvest now, decrypt later”.

France is tripling its investment (+€200m on top of €120m committed for 2024–2030). Future quantum computers could weaken current encryption: everything intercepted today may be decrypted tomorrow. Post-quantum cryptography is no longer optional — it is a responsibility.

↳ *The Sopra Steria perspective*

Sopra Steria integrates post-quantum cryptography into its Datasphere solution, compliant with ANSSI recommendations and interoperable with NATO and NIST standards.

PILLAR 03.

BUILDING AND REGENERATING FOR THE LONG TERM

The return of mass:
produce fast, produce
useful, produce at scale.

TREND 08.

Thirty years of “just-in-time” optimisation are colliding with the reality of attritional warfare. Logistical depth is becoming strategic again.

KNDS has tripled CAESAR production (from 2 to 6 units per month). Harmattan AI aims for 10,000 drones per month this year. France’s Military Programming Law commits €413bn; Germany more than €100bn for 2026 alone. The challenge: producing both complex systems and simple effectors at scale, without non-European dependency.

↳ *The Sopra Steria perspective*

With BluejaySecureCollaboration and the Connectiv-IT suite, Sopra Steria secures industrial collaboration and digitises supply chains. SCR²M enables identification and financial quantification of supply disruption risks.

€800bn

European capability requirements identified by the Readiness 2030 plan.

70–80%

Share of losses caused by drones on the Ukrainian front (US Army War College).

The drone has become a consumable munition.

TREND 09.

In three years, drones have shifted from ISR tools to a pillar of the military economy. Monthly losses now exceed annual production in Western countries.

In Ukraine, procurement has risen from 10–15,000 units in 2022 to 5–7 million in 2025. France’s Military Programming Law allocates €5bn to drones; London €4.6bn. Helsing and Stark Defence have each secured €1bn. The challenge: data fusion, standardised interoperability, and energy management for long-duration operations.

↳ *The Sopra Steria perspective*

CRIMSON integrates multi-domain autonomous unmanned systems and MUM-T orchestration into the operational chain with unprecedented effectiveness. Notably, CS Group has been selected by AMIAD for the PENDRAGON project to provide components of its CRIMSON C2 system for integration into the PENDRAGON C2.

Short cycles vs long cycles: the end of the “20-year programme” model.

TREND 10.

Ukrainian forces modify their equipment within weeks. The defence industry must learn to iterate just as quickly – without abandoning major programmes.

Dual-use startups, specialised funds, venture capital, and European mechanisms: a new financial ecosystem is emerging around AI, space, cyber, and robotics. Europe’s challenge is to combine the long timelines of major platforms with the short cycles of software innovation – without choosing between them.

↳ *The Sopra Steria perspective*

Sopra Steria structures defence innovation by connecting startups, industrial players, and public stakeholders – through open innovation initiatives and venture capital engagement – enabling the transition from prototype to sovereign operational deployment.

A FEW WEEKS

The new adaptation cycle observed in Ukraine.

01.

The economic inversion of defence – when €30,000 beats €600,000.

The cost imbalance between drones and interceptor missiles is forcing a rethink of European air defence doctrine. How is the French defence industry preparing to deliver low-cost effectors without compromising quality? What role will lasers and directed-energy weapons play?

02.

Disinformation: the hidden \$417 billion cost.

The global economic cost of disinformation equals 15% of France's GDP. Beyond political debate, how are European companies and administrations structuring their informational defence? What role do cognitive warfare and information operations play in the cyber continuum?

03.

“Harvest now, decrypt later”: the post-quantum time bomb.

Everything intercepted today may be decrypted tomorrow. Yet few European organisations – including in defence – have begun their transition to post-quantum cryptography. Where do we really stand? What realistic timelines apply? ANSSI sets the direction; industry must follow.

Our experts are available to discuss these trends and the broader intersection of digital and defence challenges.

THREE FIGURES THAT PUT THINGS INTO PERSPECTIVE

WHEN

€30k

>

DEFEATS

€600k

on the battlefield

€800bn

Europe's capability requirements –
Readiness 2030 plan

70-80%

Share of losses caused by drones
on the Ukrainian front

SOPRA STERIA, a major European player
in defence, security and space

A leading independent European player, Sopra Steria operates at the core of Defence, Security, and Space operational capabilities. As a hybrid industrial actor – both part of the digital services industry and the defence technology base – the group masters, integrates, and combines critical technologies (C2, AI, cybersecurity, sovereign cloud, autonomous systems) to support decision-making, accelerate action, and strengthen resilience across the full operational and informational spectrum.

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