



Aligning Defense Products to National Security Space Needs

***Andrew Berglund, Center for Space
Policy and Strategy***

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Emerging Approaches to Rapidly Deliver Warfighting Capabilities

Defense product companies and U.S. Space Force capability needs

- Dual-use companies have used software-driven business models and private capital to deliver solutions that meet both military and commercial needs.
- Defense Product companies represent a small but important new segment of the defense industrial base: companies that self-fund development of *military-specific* systems and capabilities in anticipation of government demand and funding.
- By signaling future demand and adapting its processes, the U.S. Space Force can incentivize this approach.
- Research explores the factors that contributed to the emergence of defense product companies and some of the challenges and opportunities to scale this model.

Contributions from all types of companies are critical to delivering national security space capabilities



Historical Examples and Characteristics

Highlighting continuity and evolution

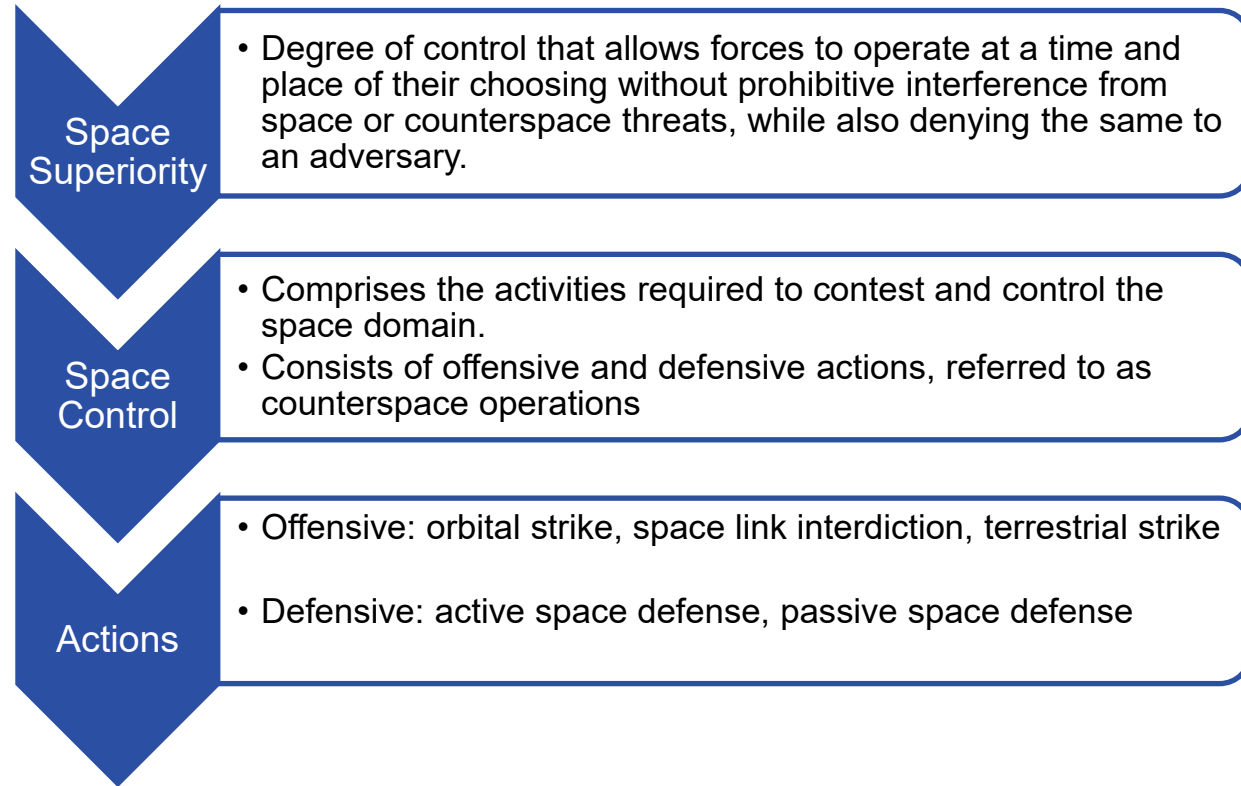
- F-20 Tigershark
 - Illustrates challenge
- MQ-1 Predator
 - Illustrates potential
 - Success enabled by changes in funding, warfare, and policy
- Defense product company characteristics
 - Anticipatory research and development
 - Financing and risk allocation
 - Product design
- Three current companies show different expressions of the defense products approach

Defense product companies will find different combinations to suit their product and market



Planning for Emerging National Security Space Missions

Counterspace operations could drive new capability needs



Offensive	Defensive
Orbital strike <ul style="list-style-type: none"> • Pursuit • Standoff 	Active space defense <ul style="list-style-type: none"> • Escort • Counterattack • Suppression of adversary counterspace targeting Passive space defense <ul style="list-style-type: none"> • Threat warning • Military deception • Hardening • Dispersal • Disaggregation • Mobility • Redundancy
Space link interdiction <ul style="list-style-type: none"> • Electromagnetic attack • Cybernetwork attack 	
Terrestrial strike <ul style="list-style-type: none"> • Ground-based fires • Maritime-based fires • Air-based fires • Space-based fires 	

Counterspace serves as a key demand signal for defense product companies



Addressing Challenges

- Oversight
 - Limited insight into design decisions and technical approaches.
 - Requirements may favor one company's product over competing solutions.
 - Will need to evolve to accommodate this distinct approach, while being sufficiently effective to ensure support among stakeholders.
- Integrated capabilities and competition
 - Potential challenge reconciling integration with business models.
 - Integrating solutions from multiple vendors and promoting competition has proven difficult.
- Market limits and exportability
 - Defense product companies confront a structural challenge inherent to their business model: reliance on a single, volatile customer.
 - International sales to allies and partners are one mechanism for mitigating government demand volatility.

Challenges are addressable within the Department's push for rapid capability delivery



Thank you