

Strategic Autonomy Ambitions in Defense Aeronautics in Europe: A Comparative Study of four Major Fighter Aircraft Programs

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Abstract

This paper examines ambitions for strategic autonomy in defense aeronautics, an increasingly central issue in a context marked by the reconfiguration of alliances, rising geopolitical tensions, and intensified technological competition. Strategic autonomy refers to the ability of states and alliances to design, produce, and maintain their own defense systems without excessive reliance on external partners, thereby preserving their freedom of decision and action.

What are the geopolitical stakes in defense aeronautics when technological capabilities and the geographical distribution of industrial power become levers of strategic influence?

This study compares the Rafale, F-35, Eurofighter Typhoon, and JAS 39 Gripen programs. It is based on the construction of an original database cataloguing subcontractors involved in defense aeronautics production. This database enables a systematic analysis of the distribution of industrial actors, their areas of specialization, and their roles within value chains.

The analysis is structured around two principal dimensions: an industrial dimension, pertaining to the control of critical components, and a geographical dimension, relating to the location and spatial distribution of production sites. The findings demonstrate that strategic autonomy is not merely a theoretical construct, but rather a concrete and multidimensional objective at the core of contemporary industrial and security policies. Moreover, each aircraft program embodies a distinct model and orientation toward strategic autonomy, thereby highlighting the differentiated trade-offs and dependencies that states accept when procuring military equipment or engaging in complex collaborative programs.

Keywords: Strategic autonomy, fighter aircraft, value chain, defense industry