

# Space Supremacy: Is Elon Musk's Starlink Becoming a Private Entity with More Geopolitical Power Than Modern Nation-States?

April 26, 2026 | SnugLab Research | [readme.snuglab.com](https://readme.snuglab.com)

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## Executive Summary

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While Elon Musk's Starlink exerts significant geopolitical influence, particularly in conflict zones, evidence suggests it is not becoming a private entity with *more* geopolitical power than modern nation-states. Starlink's dual-use technology and the unilateral decisions of its owner have directly impacted battlefield capabilities and raised diplomatic concerns [3, 6, 12]. However, nation-states retain ultimate geopolitical supremacy through their ability to regulate commercial space activities, enforce national security objectives, and actively develop sovereign satellite alternatives [6, 8, 12]. The key unresolved uncertainty lies in the long-term efficacy of these state responses against the rapid, global deployment of private constellations, and how "geopolitical power" is interpreted in an increasingly privatized space domain.

## Key Findings

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### Starlink's Geopolitical Influence and Control Over Conflict Outcomes

Starlink's geopolitical power encompasses both influencing diplomatic leverage and independently altering strategic conflict outcomes [6]. The service has become a critical communication backbone in conflicts, such as the Russo-Ukrainian War, where it is used for coordinating drone strikes, intelligence gathering, and correcting artillery fire [3, 4].

Elon Musk's personal decisions have directly impacted battlefield capabilities; for instance, he used geofencing to restrict Starlink access near the Ukrainian front lines in 2022 and denied requests to activate service near Russian-occupied Crimea [3, 6, 12].

This control over critical communication infrastructure allows a private corporation to influence combat engagement by controlling the availability of essential services [3, 4, 6].

Cybersecurity experts note that nations can become "completely beholden to his whims and desires" [3].

## **Debate on Independent Corporate Power Versus State Objectives**

The authority to geofence or terminate Starlink service is a subject of debate between independent corporate whim and state-aligned regulation. One perspective argues that Musk's personal control allows him to act as an unpredictable geopolitical force, possessing sole authority to shut down internet access for specific customers or countries [3, 10]. His use of geofencing in Ukraine due to personal reluctance to support offensive military operations and his 2024 legal dispute with the Brazilian government regarding the suspension of X accounts are cited as evidence of independent action [6, 10].

Conversely, an opposing perspective suggests these actions are an extension of the launching state's regulatory and national security objectives. All commercial space activities are legally beholden to the authorization and supervision of the launching state, which can enforce national security objectives and regulate dual-use technologies . For example, Musk denied Ukraine's request for Starlink near Crimea by citing U.S. sanctions [3, 4, 6, 12]. SpaceX executives have also stated the company's intent to ensure Starlink remains a civilian network, not for offensive military purposes [4, 7]. Despite this, the dual-use capabilities of Starlink have, in specific instances, transferred real-time decision-making power over combat engagement to a private corporation .

## **State Regulatory Frameworks and Challenges**

Nation-states can use various regulatory and legal mechanisms to address Starlink's unilateral authority. These include national tools such as export controls and licensing [6]. For example, in September 2024, the Brazilian government issued a court order to suspend X (formerly Twitter) accounts, which resulted in the freezing of Starlink's assets in Brazil; these accounts were later unfrozen after fines were paid [10]. International and multilateral frameworks, such as joint regulatory efforts among democratic nations (similar to the G7's Hiroshima AI Process) and space diplomacy, are also considered vital [1, 6]. The 1967 Outer Space Treaty (OST) serves as a foundational legal framework, mandating that states supervise non-governmental entities [3, 8, 9, 11].

Despite these tools, democratic states face significant challenges in controlling private companies [6]. The illegal use of Starlink terminals by Russian forces in occupied Ukrainian territories demonstrates the difficulty of enforcing restrictions when a country is not under direct sanctions [6].

## Emerging Competitors and Sovereign Alternatives

Starlink currently leads in deployment and scale, with over 9,357 satellites in orbit as of mid-December 2025, and plans for expansion to as many as 42,000 satellites [2, 3, 5, 8]. However, several competitors are emerging:

- **China's Guowang and Qianfan:** These state-led projects represent the largest-scale challenge, with Guowang planning up to 13,000 satellites and Qianfan planning 12,000 satellites. Initial launches for these projects began in late 2024 and continued into 2025, with mass launches planned for 2026 [12].

- **The EU's IRIS<sup>2</sup>:** This constellation is specifically designed to provide a state-controlled alternative for both civilian and military use, directly addressing sovereignty concerns [3, 12]. The network will consist of approximately 264 LEO and 18 MEO satellites [13], with an initial version expected in 2029 and full governmental services by 2030 [12]. The EU allocated €2.4 billion (\$2.6 billion) in 2022 to develop this infrastructure [3].

- **Amazon's Project Kuiper:** A commercial competitor, it plans a network of over 3,200 LEO satellites and is expected to roll out services in several regions later in 2026 [1, 5, 12].

While China's constellations offer the greatest scale to compete with Starlink, the EU's IRIS<sup>2</sup> is the primary state-led effort to establish a sovereign, non-private alternative for critical communications [3, 12]. However, sovereign alternatives currently lack the mass-scale capacity of Starlink, creating a technical disparity in global coverage [13].

## Economic and Strategic Implications of Multi-Vendor Systems

Transitioning from a single-vendor dependency on Starlink to a multi-vendor ecosystem involves significant taxpayer burdens and the need for new coordination plans. The U.S. Department of Defense (DoD) committed an estimated \$120 million for Starlink service in Ukraine for the remainder of 2022 and nearly \$400 million for the following 12 months [7]. Moving to a multi-vendor model may involve similar or expanded taxpayer burdens as governments fund or support alternative constellations [7]. The EU's IRIS<sup>2</sup> program, for example, requires an estimated €10.5 billion, with €6.5 billion sourced from public EU funds [13]. This high cost creates a tension between the necessity of sovereign infrastructure and the economic burden of funding it [13]. While a multi-vendor approach increases complexity, it mitigates the economic and strategic risks of being "completely

beholden" to a single private entity [3, 7].

## Impact of Starlink Service Restrictions

Elon Musk has used geofencing to restrict Starlink availability, impacting specific tactical capabilities. In the fall of 2022, Ukrainian troops reported service outages near the front line, attributed to Musk limiting availability due to a reluctance to support offensive military operations [6]. Musk also denied a request from Ukraine to activate Starlink near Russian-occupied Crimea for long-distance drone attacks, citing the need to comply with U.S. sanctions [3, 4, 6, 12]. In February 2023, SpaceX further restricted Starlink's use for offensive military purposes [7]. While these restrictions impacted tactical capabilities, the research does not provide evidence that these actions resulted in measurable shifts in battlefield territory control [3, 6].

## Implications

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The rise of Starlink highlights a significant shift in the balance of power, where private entities can exert substantial geopolitical influence, particularly in critical communication infrastructure during conflicts. Nation-states face the challenge of regulating and controlling dual-use technologies that can bypass traditional state authority and impact national security [6, 10]. The reliance on a single commercial provider creates vulnerabilities, necessitating the development of multi-vendor ecosystems and sovereign alternatives to ensure strategic autonomy and resilience [3, 7, 12]. The high cost and longer deployment timelines of state-funded programs like IRIS<sup>2</sup> mean that while they offer a path to strategic autonomy, they may not match the mass-scale capacity and rapid iteration of private constellations like Starlink [13]. This dynamic implies that future geopolitical power will involve a complex interplay between state regulatory authority, the economic might of private corporations, and the strategic imperative for nations to secure their own critical space infrastructure.

## Limitations and Caveats

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This report's conclusions are based on a moderate level of confidence, as the topic is empirically testable but hinges on interpreting "geopolitical power" and the long-term efficacy of state responses. The full impact of Starlink's influence is still unfolding, and the

effectiveness of emerging sovereign alternatives remains to be fully demonstrated. While service restrictions have been documented, direct evidence linking these actions to measurable shifts in battlefield territory control is limited. The rapid pace of technological development in the space sector means that the balance of power is continuously evolving, and the long-term implications of private entities operating critical global infrastructure are subject to ongoing debate and future developments.

## Sources

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