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QUARTERLY

THE SPACE RACE COMES TO LATIN AMERICA

WITH ARTICLES BY
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Latin America Looks to the Stars

The region has a huge opportunity in the booming global space industry. What is necessary to take full advantage?



WHEN ELON MUSK'S SPACEX went public in June in a record-setting \$75 billion share offering, it confirmed what investors had been betting on for years: The space industry is on the verge of a major boom. The global space economy could reach \$1.8 trillion by 2035, nearly triple its value in 2023. And Musk, among others, has signaled that much of the upcoming expansion will occur outside of the U.S.

Increasingly, the search is leading south. As Juan Pablo Toro reports in this issue's cover story, several Latin American countries are emerging as protagonists in the new space economy. Ecuador's pitch, for example, is in its name: Sitting just two degrees south of the equator, where the planet spins fastest and rockets get a free boost toward orbit, Ecuador is courting investors with the promise of cheaper launches. Plans for spaceports are now on the table in Brazil, the Dominican Republic, Peru and Uruguay, while Argentina and Brazil already build satellites that help farmers assess crops and governments respond to disasters.

Space has also become a theater in the U.S.-China rivalry, with Washington pressing local governments not to host Chinese installations. The region, for its part, is determined to be more than a battleground. But fragile institutions, thin budgets and unforgiving technical demands stand between ambition and achievement.

Laura Delgado López, a leader on Latin American space issues and fellow at Florida International University, sharpens the picture. She notes in her article that no country or company can operate in space alone. The core objective is not independence but resilience: the capacity to manage risk and diversify partners. That reframing carries a pointed message for Washington. U.S. companies increasingly offer exactly what the region wants — not black-box dependence but “sovereign solutions” that build local capacity. This presents opportunities for collaboration, if all parties can get the mix right.

Indeed, whether Latin America's moment among the stars brings genuine growth or just frustrated potential — a pattern the region knows well — remains to be seen. For now, after centuries of gazing skyward to map gods and calendars, Latin Americans are once again looking up. **AQ**

Latin America's Space Race

The region is both a battleground and an increasingly significant player in the booming global space industry. AQ breaks down how countries are seeking to capitalize.

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LATIN AMERICA'S SPACE RACE



THE SPACE RACE COMES

The region wants to be not just a battleground,



TO LATIN AMERICA

but a protagonist in the burgeoning space economy.

BY JUAN PABLO TORO





GUAYAQUIL, ECUADOR — Why would Ecuador, of all places, be a focus in Latin America's new space race?

Well, the answer is in the country's name.

On a recent afternoon, Robert Aillón and his colleagues were seated at a table in a chain hotel restaurant in Guayaquil, Ecuador's business capital, radiating enthusiasm for their proposed project: a new private spaceport for vertical launches and horizontal vehicle recovery at one of three potential sites nearby.

Some foreign investors regard Ecuador with caution at a moment when organized crime groups are battling for control of the country's seaports, key transit hubs for cocaine bound for Europe and Asia. But for Aillón and his partners, the Guayaquil area is strategic for a different reason: It sits just two degrees south of the imaginary line dividing the world into two hemispheres.

The planet rotates at its maximum speed at the equator — 1,040 miles (1,670 kilometers) per hour — making it more efficient to launch rockets from these latitudes. Thanks to the rotational boost, less fuel is needed to reach orbital velocity, which in turn means rockets can carry more payload at a lower cost.

Compared to many other countries that sit directly on the equator — a list that includes Congo, Somalia, Uganda and Indonesia, as well as Colombia and Brazil — Ecuador, with its dollarized economy and business-friendly government, looks attractive despite its security challenges.

"What's coming is big," enthused Aillón, a 50-year-old Ecuadorian who worked as a banking executive in his home country and in the United States before founding his firm Leviathan Space Industries LLC. "Spaceports are a cornerstone of future competitiveness."

Many agree. A report by the World Economic Forum and McKinsey & Company projected the global space economy could reach \$1.8 trillion by 2035, up from \$630 billion in 2023. The June initial public of-

fering Elon Musk's SpaceX, which raised a record \$75 billion, ignited even greater interest in the sector worldwide. Musk has said he will look beyond the United States for future spaceports, with Latin America an obvious potential beneficiary.

Space is also increasingly an important theater in the strategic rivalry between China and the United States, with both superpowers vying in Latin America for allies and key geography such as the Southern Cone region, whose clear skies are ideal for tracking satellites. Meanwhile, Latin American governments are determined to be not just a battleground in a new Cold War, but key protagonists in the space industry's growth and governance.

The ambitions are literally out of this world. Musk's stated goal is to establish a permanent human presence beyond Earth, thereby ensuring the long-term survival of the species. Aillón uses similar language on his LinkedIn page, calling a private spaceport in Ecuador a "first step" to interplanetary travel. Plans for launch facilities have also been floated in Uruguay, the Dominican Republic and Peru. For those still residing on Earth, Argentina and Brazil are producing satellites that have practical implications for everyday people, such as assessing crop quality and helping governments better manage natural disasters.

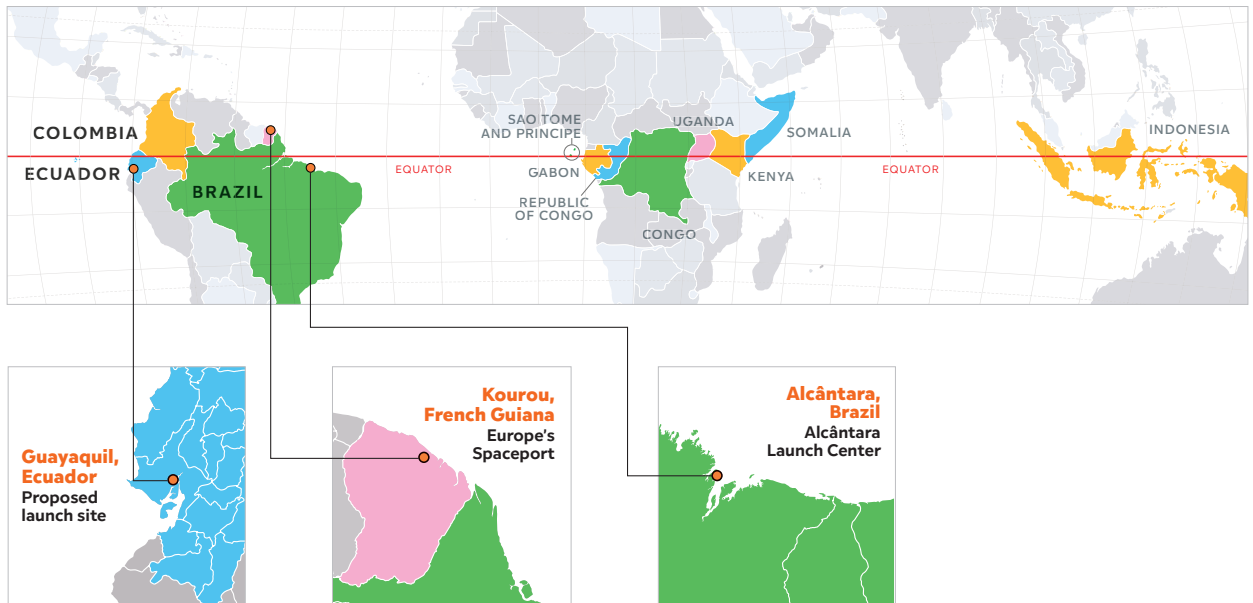
Yet observers warn of a gold rush mentality in which some investors may be overestimating the private sector's ability to build a space industry in Latin America on its own. Governments and companies must first address numerous challenges including weak institutions and limited infrastructure, they say.

"Opportunities exist, yes, but they will not materialize automatically," said Laura Delgado López, a senior fellow at Florida International University's Jack D. Gordon Institute for Public Policy. "We need to better understand the mechanisms that shape the space sector."

Indeed, the question facing Latin America's space sector today is: What is mere hype, and what is truly within reach?

THE EQUATORIAL ADVANTAGE

South America's current and proposed spaceports are located in some of the most stable countries along the Equator.



P° OVEN POTENTIAL

IT'S CERTAINLY NOT ALL speculative: The region already has a proven record when it comes to launch sites.

The Alcântara Launch Center (CLA by its initials in Portuguese) sits on Brazil's northeastern coast, in the state of Maranhão. Created in 1983, the CLA lies just 2.3 degrees south of the equator in an area with low air traffic and population density. The site is attractive enough that U.S. officials were elated in 2019 when, after decades of conversations, then-President Jair Bolsonaro signed a so-called technology safeguards agreement allowing U.S. technology to be used at the site.

However, even Alcântara has been a story of frustrated potential. Following a rocket explosion on a CLA launch pad in 2003 that killed 21 engineers and technicians, observers say the center was under-utilized for many years. Most launches are suborbital, meaning they reach space just briefly, at about 60

miles above sea level, allowing for microgravity experiments, atmospheric studies and the growing industry of space tourism.

Alcântara saw its first commercial launch in December 2025, with a rocket from the South Korean firm Innospace that crashed under a minute after liftoff. Innospace plans to launch from the CLA again this year.

The other major launch site on the continent lies about 1,250 miles east — in French Guiana, an overseas region of France. Often called Europe's Spaceport, the facility began operations in 1968 and is jointly operated by the European Space Agency (ESA) and France's National Centre for Space Studies, launching both government and commercial rockets.

In recent years, many countries in Latin America and the Caribbean have used the European facility to transport their satellites, illustrating the lack of fully viable alternatives inside the region itself.



The rocket launch tower at Brazil's Alcântara Launch Center in 2018

Still, no one doubts the growth possibilities. The ESA projects the number of satellites orbiting the Earth will soar from about 10,000 today to 100,000 by 2030. Many will be small devices deployed in constellations, like those SpaceX operates in low Earth orbit over various parts of the world to provide internet services, a market Amazon is poised to enter as well.

All that growth will require new launch sites, as well as new players. SpaceX's IPO was considered a milestone in what some call "new space" — an era in which state monopolies are being replaced by private companies that take large risks, have financial backing, and are oriented toward profits.

But the barriers to entry are high. Aillón, the Leviathan Space CEO, cited the example of SaxaVord Spaceport on the Scottish coast, which with an initial investment of \$57 million is expected to see the launch of a suborbital rocket this boreal summer. For

Leviathan's initiative, Aillón said he was attempting to raise \$800 million beginning this year. The firm has already secured its first partner: Florida-based Blackstar Orbital, which is betting on breaking into the market for cargo or surveillance space drones.

Not everybody can follow the SpaceX model, warned Victoria Valdivia, global fellow at the European Space Policy Institute and fellow at the co-SPAR-EUROMOONMARS-LUNEX initiative.

"In Latin America there is a tendency to talk about 'new space' and the space economy, particularly among many startups that seem to fill the void in an area where states have been inefficient," said Valdivia, who is also a PhD student at the Instituto de Estudios Avanzados at Universidad de Santiago de Chile.

"Because their projects are attractive, they receive a great deal of visibility, but since they are more focused on business than on regulations, they forget



that they need an entire organizational framework to operate,” Valdivia said. She cited environmental permits, as well as flight and tax considerations, where Latin American bureaucracies “are not exactly agile.”

THE U.S.-CHINA RIVALRY

STILL, THE REGION HAS other natural advantages. Satellites must be monitored and tracked from the ground, but only about one-third of the Earth’s land area lies south of the equator. That places South American territory at a premium, especially areas where skies are generally clearest.

Indeed, certain locations are coveted by major powers looking to maximize their reach — what the nascent field of “astropolitics” understands as the set of activities and technologies a state can deploy in space for purposes of war, development, and prestige.

A recent U.S. congressional committee report noted that China has built 11 facilities for satellite communications and radio telescopes in Latin America, including in Argentina, Bolivia, Brazil, and Venezuela, sparking concern among U.S. officials over their dual-use potential, given Beijing’s explicit doctrine fusing civil and military operations.

To block new initiatives, the Trump administration — in an updated application of the Monroe Doctrine — is openly pressuring countries not to host new Chinese space-related installations. In the mountains of Argentina’s San Juan Province, the CESCO radio telescope that China was building sits inactive, having been sidelined by U.S. pressure.

In Chile’s Atacama Desert, atop the flattened peak of Cerro Ventarrones, some of the components that were to form part of an astronomical observatory remain in place — a project canceled by Chilean authorities citing legal issues, following Washington’s

warnings about the threat it posed to the security of U.S. space assets.

China’s ambitions remain large. Following in the footsteps of Musk’s Starlink, Chinese companies are seeking to build their own satellite constellations to provide wireless communications services — among them Guo Wang, managed by the state-owned China Satellite Network Group, and Qianfan, developed by Shanghai Spacesail Technologies Co. Ltd.

According to the International Telecommunication Union’s website, several Chinese satellite operators filed requests during the final week of 2025 to deploy more than 200,000 devices in the coming years — an astronomical figure that runs up against bottlenecks in the launch sector and has already prompted the Asian giant to explore the possibility of establishing an equatorial spaceport in Malaysia. Some analysts wonder if their next push will be in South America.

CONFRONTING THE OBSTACLES

IN THE MEANTIME, companies and government officials are working to solve some of the bottlenecks facing the space industry — and hopefully seize the moment.

In 2024, Brazil enacted a space activities law that “would enable more legal security for launch operators from Brazil” and thus represented “an important step toward future CLA business with other foreign, private and government launchers,” according to Bruno Martini, an aerospace scientist at the Brazilian Air Force University (UNIFA). A new state-owned company, Empresa de Projetos Aeroespaciais do Brasil S.A. (ALADA), also began operations in 2025 with the goal of strengthening the Brazilian space program, including the commercial use of the CLA. Brazil is now working to develop its own rockets.

**NO ONE DOUBTS THE GROWTH POSSIBILITIES.
THE NUMBER OF SATELLITES ORBITING EARTH IS PROJECTED
TO SOAR FROM ABOUT 10,000 TODAY TO 100,000 BY 2030.**

THE U.S. GOVERNMENT IS EAGER TO EXPAND LAUNCH SITES WITHIN THE WESTERN HEMISPHERE AS PART OF ITS GEOPOLITICAL CHESS MATCH WITH CHINA.

Despite this renewed momentum, lack of funding remains a challenge. The National Confederation of Industry noted in a 2025 report that the national budget of \$47 million allocated to the space sector equated to just 0.002% of Brazil's GDP in 2023 — the second-lowest level of investment among G20 countries.

Much farther north, in the Dominican Republic, President Luis Abinader himself announced during his annual address to Congress in February that his country would begin construction of a spaceport — thanks to an agreement with U.S. company Launch on Demand (LOD Holding) involving an investment

of \$600 million. “We are going to launch a satellite or a rocket into space from Pedernales — just wait and see,” the president declared. The milestone is expected to occur in May 2028.

LOD Holding is led by Burton Catledge, a retired U.S. Air Force colonel who previously commanded the Air Force's 45th Operations Group, 45th Space Wing, supporting numerous rocket launches for industry giants like SpaceX, Blue Origin, and Moon Express, and also served at the Pentagon.

In an interview with *AQ*, Catledge explained that the site in the Dominican Republic was chosen because of its relative proximity to the equator (18 de-



Northern Chile's ALMA radio telescope is composed of 66 high-precision antennae.



grees north), access to open waters, low population density, favorable high-altitude winds, and availability of multiple orbital trajectories. He also pointed to the construction of a nearby seaport — enabling the delivery of large space hardware — and the expansion of a neighboring airport for satellite transport, both being promoted by the government.

“President Abinader said in a meeting: ‘Burton, here is my phone number. If you have to wait more than 48 hours for anything, call me’ ... From that moment on, every door opened,” Catledge said. As recently as May, 528 acres of state-owned land were acquired for this purpose, and a Memorandum of Understanding was signed with the Instituto Tecnológico de Santo Domingo (INTEC) to train engineering and related students in highly specialized aerospace disciplines, laying the groundwork for the development of a space economy in the country.

The project envisions four launch pads — two for heavy and superheavy rockets, one for medium rockets, and one for small ones — that will operate independently. Financing comes from private institutional investors rather than public funds, Catledge said.

The Launch on Demand CEO said the project also has political backing from the U.S. government, eager to expand launch sites within the Western Hemisphere as part of its geopolitical chess match with Beijing. Catledge said he saw a “tangible commitment from the U.S. that they’re not just saying they’re pivoting to the Western Hemisphere — they in fact are.”

MATTE’ S OF NATIONAL INTE’ EST

FAR FROM THE ENTHUSIASTIC entrepreneurs of the private sector, Peru has chosen to travel the “old space” route to attempt to develop a spaceport — drawing on its experience managing large infrastructure projects in partnership with foreign actors, despite its persistent political instability of recent years.

In November 2024, Peru’s space agency, an entity under the Ministry of Defense, signed a Memorandum of Understanding with NASA, under which cooperation began on joint feasibility studies of launch sites, technical assistance, and planning for future launches.

The Ministry of Defense’s 2023–2026 Multi-Year Investment Report on Public-Private Partnerships estimated the project’s cost at \$270 million and said it would aim to facilitate rocket launches for orbital as well as suborbital flights: “Those that will transport people to other continents in less time without completing a full orbit of the Earth.”

The spaceport would be located at a Peruvian Air Force base — either in Chiclayo, Arequipa, or Talara, with the last of these generating the most discussion given its location four degrees south of the equator. Delegations of U.S. space specialists have visited Peru to discuss the vast array of political, social, financial, economic and regulatory considerations the country must take into account if the project is to go forward.

“It is part of a national initiative through which the country aims to become a connectivity hub, given its strategic location and policy of openness and global integration. It is also a way of compensating for weaknesses in infrastructure,” explained Clemente Rodríguez, a researcher at the Center for Strategic Studies of the Peruvian Army. He noted that Peru recently opened a major Pacific port, expanded its main airport in Lima, and is considering the construction of a rail corridor to Brazil.

Even the Peruvian Congress overcame its chronic divisions to pass by a wide margin, in March, the bill submitted by former President Dina Boluarte declaring the creation of a spaceport to be a matter of national interest. Law 32571 authorizes the Ministry of Defense to lead the technical and legal studies that will determine the project’s viability.

In past centuries, the peoples who inhabited the American continent gazed upon the Infinite to find their gods, devise complex calendars and orient their pyramids. Today, even though work is still needed to bring these dreams to fruition, Latin Americans are once again looking to the stars. 

Toro is a senior research fellow at the Chilean think tank AthenaLab, which he co-founded in 2019, and a professor of journalism at the Pontificia Universidad Católica de Chile



TAKING FLIGHT

Initiatives from Brazil, Argentina and Mexico show how the space industry is getting off the ground, although numerous challenges remain.



Brazil's Landmark Satellite Program

Amazônia-1, the first satellite entirely designed and operated by Brazil, is part of a mission that includes two future units.

by Emilie Sweigart

WITH THE LAUNCH OF the Amazônia-1 satellite five years ago, Brazil displayed its growing space capabilities. Now, the country plans to put two new units into orbit as part of a mission to observe and monitor deforestation in the Amazon, natural resources and agricultural areas.

Launched from India in February 2021, Amazônia-1 was the first Earth observation satellite fully designed and operated by Brazil, built on lessons learned from the ongoing China-Brazil Earth Resources Satellites (CBERS) program, which began in the 1980s. Since then, Brazil has engaged in

technology transfer and exchange with China as well as developed its own satellite capabilities.



Amazônia-1 at a launch base in India in 2021

Amazônia-1 is the first to use Brazil's Multi-Mission Platform, a generic satellite bus designed to be cost-effective and reduce development time. The platform will also be used on Amazônia-1B, a satellite expected to launch from Europe's Spaceport in French Guiana in 2027. It will be part of Brazil's AQUAE mission to monitor domestic water resources, and a dual satellite program with Argentina, SABIA-Mar, to monitor oceans and coastal areas. A launch date for Amazônia-2, the Amazônia mission's final satellite,

is yet to be announced.

Despite Amazônia-1's success, "celebrating one or two satellites launching is not enough" for the size of Brazil's space ambitions, Bruno Martini, an aerospace scientist at the Brazilian Air Force University (UNIFA), told *AQ*.

Funding remains a major obstacle. According to the National Confederation of Industry (CNI), Brazil's space sector received \$47 million in public fund-

ing in 2023, equivalent to 0.002% of its GDP and the second-lowest level of investment in the G20, ahead only of Mexico.

Brazil has had "great ambitions since the '60s," said science journalist Salvador Nogueira. "But if you don't have a space policy that invests adequately, we can't really go that much forward." AQ

||||| Sweigart is an editor at *Americas Quarterly*

How Satellogic Is Trying to Reshape the Space Race

The company founded in Buenos Aires is pushing competitors to rethink who owns the sky.

by Horacio Aizpeolea



BUENOS AIRES — For more than 15 years, Satellogic has been working to fulfill its foundational promise: democratizing access to high-resolution satellite imagery by offering data at significantly lower costs than traditional competitors.

While legacy rivals limit satellite Earth observation imagery to wealthy governments and large corporations, Satellogic is betting that lower costs can become not only a commercial but also a geopolitical differentiator, via its growing network of satellites that monitor hundreds of sites worldwide each day.

The company, founded in 2010 in Buenos Aires and Nasdaq-listed (SATL), announced in May an \$18 million contract to provide strategic defense monitoring to a new undisclosed client. The deal was more than a commercial milestone. For some, it signaled that Latin America's

space ambitions have moved beyond symbolism.

"Satellogic is the incarnation of the new space logic," Lucas Arias Coco, a researcher at the AI & Robotics Group (GIAR) of the National Technological University in Buenos Aires, told *AQ*.

The company's services span precision agriculture, environmental management, and defense. It also offers turnkey satellite systems to sovereign clients, giving smaller nations a faster path to technological independence in Earth observation. Satellogic, now headquartered in Davison, North Carolina, has been expanding its customer base and,

in the first quarter of the year, signed deals in Australia, Malaysia, Albania, and Portugal, as revenue grew 80% year over year to \$6.1 million.

"Defense and intelligence organizations are the primary drivers of demand because they understand that persistent



A Satellogic satellite captured this image of Palau Bohayen in Malaysia.

intelligence is becoming a strategic capability,” Alan Kharsansky, Satellogic’s chief technology officer, told *AQ*. “Our view is that the market is evolving beyond Earth observation. Customers don’t wake up wanting satellite imagery. They want to understand what’s happening in the places that matter to

them,” he added.

The company plans to launch its AI-driven Merlin constellation in October and have it fully operational in the first quarter of 2027. *AQ*

Aizpeolea is a Buenos Aires-based journalist

Argentina's Global Satellite Aspirations

The national space agency, CONAE, has yet to announce details of two upcoming SAOCOM launches.

by Horacio Aizpeolea

BUENOS AIRES — At a time when fiscal constraints and political volatility often undermine long-term planning in Latin America, Argentina’s SAOCOM satellite program stands out as a rare example of sustained strategic investment.

Developed by the National Space Activities Commission (CONAE) in the 2000s during the presidency of Néstor Kirchner, the program relied on major contributions from the state-owned technology firm INVAP, the nation’s atomic commission (CNEA), private company VENG, and Italy’s space agency. Unlike conventional optical satellites, SAOCOM-1A (launched in 2018) and SAOCOM-1B (2020) are equipped with L-band synthetic aperture radar (SAR) that can collect data through clouds, smoke, and darkness, providing reliable information under virtually any weather conditions.

Argentina designed the satellites — as part of an ambitious \$600 million project — primarily to support its thriving agricultural sector, monitor natural disasters, and measure soil moisture. The satellites help improve crop management, assess drought



SAOCOM-1A with its radar antenna deployed

risk, and strengthen disaster preparedness.

“The true value of projects like SAOCOM lies not merely in the satellite itself, but in the knowledge, experience, and industrial capabilities they generate — which can subsequently be applied to new missions, products, and enterprises,” Gabriel Sanca, a professor and researcher at

the National University of San Martín (UNSAM), told *AQ*.

Through a partnership with Italy’s space agency, SAOCOM also supports the operation of COSMO-SkyMed, a dual-use (civilian and military) Earth observation satellite constellation considered one of the world’s most advanced systems for environmental monitoring and emergency management.

A next-generation SAOCOM-2 constellation is under development, although launch schedules remain undetermined. Early plans envisioned launches in 2025 and for this year, but more recent international mission databases suggest deployment could slip into the latter part of the decade. CONAE declined to comment on details for the upcoming launches.

In the meantime, Argentina has also made inroads with microsatellites. In April, a shoebox-sized satellite, known as *ATENEA*, transmitted its first telemetry data from space as part of *NASA*'s *Artemis*

II mission, highlighting the sector's potential and global aspirations. **AQ**

Aizpeolea is a Buenos Aires-based journalist

Latin America Has a Space Agency. Now Comes the Hard Part.

ALCE faces pressing questions about its political support and future funding.

by Cyntia Barrera Díaz

MEXICO CITY — The Latin American and Caribbean Space Agency (*ALCE*) held its first general assembly in Mexico in February, marking the transition of a five-year-old diplomatic ambition into an operational institution. Of the 18 countries that signed the agency's founding convention in 2021, only 11 ratified it. The challenge ahead is making it matter.

Since its inception, the agency has attracted expressions of cooperation from the European Space Agency (*ESA*) and China's National Space Administration (*CNSA*). Spain's and Italy's space agencies have followed suit, while South Korea's Aerospace Research Institute (*KARI*) was designated as its permanent technical advisor.

But alongside expressions of international support, the case for internal concern is equally real. *ALCE* has yet to publicly disclose how much its member states contribute or what its operational budget is, and the institution needs to align the aspirations of many national agencies with limited resources. Mexico, the agency's loudest advocate, slashed its 2026 budget by over a third, to around \$2.6 million, making it one of the world's most underfunded such agencies. A constitutional reform that would give the space sector a robust le-

gal framework and attract private investment remains stalled in the Senate.

Besides these concerns, geopolitics cast doubt on *ALCE*'s future. Brazil, the region's most advanced space power, never joined the agency, a decision compounded by its temporary withdrawal from *CELAC*, the regional body under which *ALCE* was established. Argentina, one of the agency's early promoters and cofounders, signed the founding convention but never ratified it after the Milei government pivoted away from regional multilateralism.

"It is disheartening that, despite sharing a common language, cultural traits, and a shared geographical area, we are unable to establish cooperation for the common good," Valeria Ramos Barba, a consultant on space law and policy based in Tokyo, told *AQ*.

Until now, the priorities *ALCE* has outlined — environmental monitoring, disaster risk management, food security, and digital connectivity — address real and urgent regional needs. The question

remains whether the agency will be able to deliver on its lofty ambitions. **AQ**

Barrera Díaz is a bilingual editor and journalist based in Mexico City



The convention establishing *ALCE* was signed in Mexico in 2021.



LATIN AMERICA'S QUEST FOR SPACE SOVEREIGNTY

**The region's pursuit of autonomy in
the growing space sector is more complex
than it seems. The U.S. can be an
important partner.**

by Laura Delgado López

EARLIER THIS YEAR, Brazil's telecommunications agency Anatel officially authorized SpaceSail, a broadband constellation often described as China's equivalent to Starlink, to operate in Brazilian territory. The announcement didn't generate many headlines, but it deserves more attention. Not because it was a statement about China, but because it was a statement about the region's desire for options.

Across Latin America, professionals in the space industry are consistently advocating for solutions with sovereignty in mind. Chile's 2025 National Space Policy calls for national space capabilities to "strengthen autonomy and independence." Argentina's defense doctrine reinforces a desire for independent launch access, viewed as a vital component of national defense and sovereignty. A technical working group in Brazil is studying options for a sovereign alternative to the systems that provide position, nav-

igation and timing (PNT) services. And so on.

The autonomy agenda in Latin America is not inherently anti-U.S., nor is it pro-Chinese. It is also not unique to the region. European leaders have the same concerns and are attempting to balance what is nationally developed with what is sourced via partners or the international market. This is not only a function of geopolitics but a response to a sharper awareness of vulnerability and the need for resilience.

Indeed, these recurring ambitions reflect a genuine concern that, as reliance on space technology increases, dependence on foreign space systems is a strategic liability. Autonomy, sometimes alternatively couched as self-sufficiency or sovereignty, has thus become a key organizing concept for Latin American space ambitions. The question is what that means in a global sector, and whether the U.S. is adequately positioning itself to be part of the answer.



A rocket carrying satellites blasts off from a commercial spacecraft launch site in China's Hainan province in 2025. The satellites are part of China's broadband constellation SpaceSail, recently authorized to operate in Brazil.

THE LIMITS OF GOING IT ALONE

THERE IS A VERSION of autonomy that is as headline-grabbing as it is unworkable: fully independent, indigenously developed and controlled space systems that depend on no foreign provider or system. This narrative may stroke nationalistic egos, but it is not realistic. It ignores the gargantuan financial, infrastructure and human resources that would need to be mobilized in the near term and, importantly, maintained in the long term. But it is also misplaced because of something more fundamental: the nature of space itself.

Space activities are global and integrated by both design and physics. The international governance framework that has guided space activities for decades reflects this reality: orbits, spectrum, and the operating environment are all shared resources. Satellite services require ground infrastructure distributed across the planet. Even full-scale PNT systems

depend on a global geodetic supply chain for a common understanding of time and space. To be clear, competition, conflict, and structural asymmetries are real, but they coexist with an unavoidable need for coordination. No country operates in space truly alone. Interdependence is the nature of the domain.

This creates a genuine tension at the heart of the space autonomy narrative. Reducing vulnerability is important, but it should not be confused with pursuing total technological independence. That is not only infeasible; it can be counterproductive. In the region's fragmented space ecosystems, efforts to build independent capabilities, without the governance and institutional frameworks to use them effectively, may just relocate risk.

Owning a satellite does not mean you control everything needed to use it. A country can build its own system to take images of its territory from space

TODAY, U.S. SPACE ENGAGEMENT IN THE AMERICAS IS MEANINGFUL BUT DISJOINTED.

and still depend on foreign weather data, additional commercial imagery, partner analytics, and secure communications to turn those pictures into actionable information, such as during a natural disaster. A cyberattack on a communications link, an unclear chain of command, or a licensing restriction on how data can be shared can each render a sovereign asset far less useful than it appears. Autonomy that focuses on one piece of the puzzle can lead to a false sense of security.

The more useful frame is not independence, but resilience and the ability to make informed decisions. Autonomy in space should be perceived as maintaining the ability to manage risk, select appropriate approaches, and negotiate with partners from a position of competence, avoiding arrangements that constrain future options. That is a different goal, and it leads to different strategies.

WHO GETS TO DEFINE AUTONOMY?

THE SPACESAIL STORY REFLECTS the logic of autonomy more than any particular affinity for Chinese technology. In the last few years, leaders in the region watched with concern, perceiving Starlink access as unreliable, if not capricious, even as it shaped military outcomes in Ukraine. Closer to home, Brazilian media speculated openly in 2025 about whether Washington might weaponize access to GPS during a low point in bilateral ties. While that was never likely, it reinforced a desire to protect freedom of action and invest in the capacity to act independently. From a Brazilian policy perspective, having a viable alternative to Starlink, even a Chinese one, expands the menu of options.

The choices made while building capacity at speed can have long-term consequences. These choices in-

volve what partners to work with, standards to adopt, and technologies to integrate. The 2024 memorandum of understanding between Brazilian telecommunications company Telebras and SpaceSail included language that referred to a possible Brazilian subsidiary to enable investment, knowledge-sharing around the “governance and operational mechanisms of space infrastructures,” and potential joint projects. These additional aspects may increase the agreement’s value for Brazil, but could also complicate the stated goal of “guarantee[ing] the independence and autonomy of the State.”

On the practical side, building infrastructure around Chinese operational standards, procedures, suppliers, and technology could create constraints that limit interoperability with other systems, akin to attempting to plug a U.S. device into an Argentine socket. On the political side, certain choices will be incompatible with foreign export control rules or cybersecurity requirements, potentially limiting Brazil’s room for maneuver elsewhere in its space ecosystem. This may prevent deeper engagement on space situational awareness (SSA) with U.S. security partners and future commercial opportunities.

Another concern is that autonomy narratives often fail to specify which capabilities are truly critical and should be prioritized. Countries thus risk pursuing programs without sufficient depth or attention to vulnerability. This is especially problematic in a sector that is resource-intensive, technically unforgiving, and still perceived by the public as a luxury. The emphasis on launch capability is a useful example. An operational launch site does not automatically lead to a functioning space ecosystem, let alone an autonomous one. It is one part of an equation that includes satellite development, mission operations, data pro-

cessing, governance capacity, skilled personnel, and institutions capable of actually using space information. A country that puts too many of its resources into the launch basket may still depend on others for the systems it needs to manage agriculture, monitor illegal fishing or support national security.

The risk, then, is not that Latin American actors are pursuing autonomy in space. It is that they may pursue it in ways that curtail the flexibility that autonomy is supposed to deliver.

U.S. PARTNERS IN THE MIX

THIS IS WHERE U.S. entities, both governmental and commercial, have a genuine but underemphasized opportunity.

The U.S. commercial space industry now offers regional partners much more than discreet products or services. A growing number of companies provide “sovereign solutions” — dedicated satellite capacity, proprietary ground infrastructure, and advanced information products licensed in ways that preserve operational independence. Earth observations company Planet, for example, sells not just data but satellites and end-to-end architectures. Sling-shot Aerospace offers a comparable range on the SSA front, including dedicated sensors for direct access to tailored orbital data.

This speaks directly to what many Latin American governments want: not black-box offerings that deepen dependence, but solutions that expand national capacity and build relationships.

With space such a highly regulated and politically sensitive sector, however, this opportunity will not grow on its own. U.S. companies need more active government support to win against foreign vendors offering competitive options under less stringent technology transfer rules. The administration’s 2025 National Security Strategy hints at commercial diplomacy. That should translate into facilitating market access, aligning export frameworks with partnership goals, and providing backstopping through insurance to mitigate risks. It should also mean adopting a model of engagement akin to the Comprehensive Dialogues on Space held with Japan and France to bring U.S. industry into bilateral engagement.

Today, U.S. space engagement in the Americas is meaningful but disjointed. A stronger U.S. offer would be not just military cooperation, not just scientific data sharing, and not just commercial sales, but one that aligns these to advance shared priorities.

AUTONOMY IS NOT ISOLATION

FOR THE U.S. TO embody the often-used phrase “partner of choice” in Latin America, it must do more than just show up. It requires a deliberate effort to better connect U.S. civil, commercial and defense activities. This means adopting an integrated approach to engagement, exchanging information across agencies, and leveraging official visits, relevant conferences and trade shows for U.S. government and non-government entities to build relationships with their counterparts. It means intentionally directing diplomatic resources to help U.S. business compete and succeed.

Being a strong partner means recognizing that the U.S. advantage is not hardware alone, but also the training, workflows, standards, best practices, and project-management excellence that turn space capabilities into operational value. Done well, this would move the conversation beyond “choose the U.S. or else” and position the U.S. space sector to help regional partners build real capacity: the capacity to choose.

Autonomy and alignment are not opposites. In space, where systems are global and threats are shared, genuine autonomy is built through diversified, interoperable partnerships, resiliency that enables actors to allocate risk smartly, to know when to tap into domestic or partner-provided tools, and when to opt for non-space solutions. The U.S. has more to offer on that agenda than it is currently delivering. ^{AQ}

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BEYOND HARDWARE: LATIN AMERICA'S SPACE WORKFORCE CHALLENGE

by Jeanette Nuñez

IN LATIN AMERICA AND AROUND the world, today's satellites do so much more than before. They help monitor illegal deforestation, expand broadband access to remote communities, improve disaster response, and strengthen maritime awareness. Governments across the hemisphere increasingly view space capabilities as essential infrastructure for economic development, resilience, and national security.

But as space technologies become more integrated into critical sectors, countries are also pursuing something larger than access to orbit: They are seeking the institutional and technical capacity to participate meaningfully in the emerging space economy.

That ambition is reshaping international cooperation. Rather than simply seeking satellites or launch services from external powers, Latin American countries are pursuing partnerships that strengthen sovereign capabilities through workforce development, research collaboration, technology transfer, and commercial integration. In short, the region increasingly seeks partnership, not dependency.

Broader changes in the global space economy are accelerating this shift. Falling launch costs, increased availability of technology, expanding low

Latin America's Final Frontier

The booming space sector offers opportunities, if the region can seize them.

by Susan Segal



Susan Segal is the CEO of Americas Society/Council of the Americas

LATIN AMERICA HAS LONG been known for its natural resources: abundant energy supply, minerals, agriculture and more. Until recently though, few people recognized it had the resources to become relevant in the space sector, too.

Indeed, strategic locations near the equator, and clear skies especially in the Southern Cone, make much of the region ideal for satellite launches and ground observatories and data centers. Ecuador, Argentina, Chile, Brazil, Peru, and the Dominican Republic are among the countries with big opportunities in front of them.

It's not just about geography, of course. Latin America has entrepreneurs such as Marcos Galperin and Martín Migoya who have created world class companies, provided hope and seeded an ecosystem that supports and encourages the creation of other new businesses. That innovative spirit has supported the creation of companies including Satellogic in Argentina and Visiona Tecnologia Espacial in Brazil.

There is a certain amount of "space fever" throughout the globe at the moment, especially in the wake of Elon Musk's successful stock offering for SpaceX. The question is whether Latin America can take full advantage.

Over the almost 50 years that I have worked with the region I have witnessed boom to bust multiple times. The region has seized some opportunities and missed others. In the case of space, it seems that the private sector cannot go it alone — governments will need to provide the regulatory framework, infrastructure and sometimes the capital necessary for success. Policy continuity across successive governments, even those of differing ideology, will also be key as always.

If Latin America can succeed this time, it will clearly place them at the center of a booming and future global industry. So space is the last and possibly the best frontier for Latin America! 