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Clearing the Skies

Elevating
european
capabilities
in drone and
counter-drone
systems

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Event report

“Elevating European capabilities in drone and counter-drone systems” was the key discussion curated by Friends of Europe on May 12th. The dinner brought together practitioners, EU and NATO officials, industry leaders and Ukrainian representatives to explore how drones and counter drone systems are redefining modern warfare – and what Europe must do to respond.

The discussion centred on three interlocking challenges: overcoming Europe’s fragmented defence procurement, harnessing Ukraine’s wartime innovation ecosystem in drones, and building a coherent European defence ecosystem that integrates emerging technologies. Andrius Kubilius, European Commissioner for Defence and Space and Štefan Füle, former EU commissioner for enlargement, Founder of U&C UAS and Trustee of Friends of Europe, set the tone and framework for the ensuing debate.

Fragmented procurement: from structural weakness to strategic lever

Participants described defence procurement fragmentation as one of Europe’s core structural weaknesses given that defence is still treated as a sovereign domain. Industrial capacity, capability planning and political decision making remain largely national. This results in parallel programmes, overlapping product lines and patchy interoperability, even in critical areas such as air defence and command and control. Some participants contrasted this challenge with Europe’s ability to deliver joint, world class space systems and questioned why similar ambition has proved so elusive in defence.

Procurement was cast as both culprit and cure. On the negative side, repeated efforts at joint development fall into a “national politics–industry trap”: when trade offs bite, governments shield domestic champions, undermining cooperation. Trust is thin, so systems selected and certified by some member states are not automatically accepted by others. Classic acquisition cycles are long, centralised and designed for platforms with decades long lifespans – a poor fit for technologies that evolve on much shorter timelines.

Yet procurement is also the most powerful lever available. Several contributions argued that access to EU level support for drones and counter drones should come with clear conditions: joint procurement, shared requirements, open architectures and common testing. Several contributions converged on the idea that access to EU level support for drones and counter drones should be made conditional on interoperability and joint action – effectively a principle of *‘no EU funding without shared standards and joint procurement.’* New instruments already push in this direction, from pan European projects of common interest in drone defence and eastern flank surveillance to loans and grants that explicitly reward joint purchasing. Procurement hubs in existing EU structures are being prepared to aggregate demand and manage framework contracts, including “as a service” models rather than one off buys.

Unease about “initiative overload” was recurrent during the conversation. The European landscape is increasingly crowded with programmes, labels and pilot schemes. Without clear priorities and hard choices, fragmentation risks being repackaged rather than resolved. The emerging view was that Europe should preserve constructive diversity – a mix of large firms, mid caps and SMEs – but organise it within a shared framework of open standards, joint test centres and interoperable architectures. The goal is not a single “European champion” but an ecosystem in which many actors can plug into a dynamic and coherent whole.

Ukraine’s drone ecosystem: from recipient to co architect

A second defining theme was that effective drone warfare depends on a living innovation ecosystem rather than on individual products. Strategic advantage does not come from owning state-of-the-art drones, but from synthesising doctrine, data, training, industrial capacity and feedback into a functioning feedback-driven and iterative ecosystem.

On the Ukrainian front, adaptation cycles are extremely short. New enemy tactics or counter measures trigger changes in software, payloads, communications and tactics within weeks. Numerous frontline units acquire equipment directly via online platforms, selecting from multiple suppliers based on battlefield performance rather than long procurement chains. Such decentralised demand - enabled in large part by initiatives such as Brave1 - drives competition and rapid innovation.

Ukraine’s industrial base has grown dramatically during the war, from a small cluster of producers to hundreds of companies working on aerial drones, electronic warfare, unmanned ground vehicles, loitering munitions and interceptors. Many firms not only design and build systems, they also deploy teams of operators integrated into regular forces, keeping private sector dynamism closely aligned with frontline needs. Participants stressed that while software, sensors and communications can become obsolete quickly under electronic warfare pressure, many physical components – motors, frames, propellers – remain usable for years. This reality argues for software updates-driven modular designs rather than constantly replacing entire platforms.

The Ukrainian ecosystem is not without constraints. Supply chains for key components are fragile, and further scaling requires finance and risk taking that are hard to secure in wartime conditions. European financial instruments capable of supporting defence and dual use projects were seen as potential tools to de risk investment and strengthen the broader ecosystem.

There was a strong call to treat Ukraine not merely as a beneficiary of European aid, but as an indispensable partner and co architect of Europe’s defence future. Its armed forces, industry and policymakers have accumulated modern warfare combat experience that no EU member state presently possesses. Its innovation clusters and battlefield driven procurement models offer practical templates for connecting frontline needs, industry and regulators. While technology transfer raises difficult issues around intellectual property, export controls and long term security guarantees, participants argued these can be managed through clear legal and political frameworks that respect both Ukraine’s interests and Europe’s need for resilience and autonomy grounded in mutual trust and reciprocity.

Emerging technologies and a coherent European defence ecosystem

The third strand of the discussion widened the lens beyond drones to the broader defence ecosystem required to integrate emerging technologies. Participants argued that Europe must move from a platform centric mindset to a “systems of systems” approach in which drones, counter drones, AI enabled command and control, advanced sensing and electronic warfare are designed, procured and operated as a coherent whole. Current planning, capability development and regulatory frameworks – built around large, manned platforms and long lifecycles – are not yet configured for this reality.

Emerging technologies in drones and counter drones are fundamentally reshaping how Europe must think about control of its airspace and the protection of critical nodes. Dense constellations of unmanned systems in air, land, maritime and subsea domains, combined with automation and AI, demand common architectures, shared data standards and interoperable C2 if European forces are to cooperate effectively. Without this, national investments risk producing isolated capabilities that cannot be combined at scale.

To close the gap between rapid innovation and slower institutions, participants highlighted the need for a European network of unmanned systems technology hubs. These hubs would connect military users, industry, startups and research organisations to test, red team and iterate new solutions under realistic conditions, and to anchor them in shared technical and operational standards. Modular, open, update friendly standards and certification processes – focused on key interfaces rather than monolithic specifications – were seen as essential to allow subsystems to evolve quickly without sacrificing interoperability. Operational and combat experience, especially from Ukraine, should feed directly into how these emerging technologies are specified, validated and embedded in European forces. This broader ecosystem logic was also reflected in discussion of a pilot project presented by U&C UAS, and led jointly with Ukrainian drone manufacturer DeVIRo, and which pointed to a more integrated model for linking capability development to operational needs, industrial adaptation and long-term readiness.

Civil–military cooperation remains a critical enabling factor for this ecosystem. Many assets exposed to drone and counter drone technologies – from airports and ports to energy and logistics hubs – are privately owned. Defence actors cannot integrate emerging technologies effectively without the participation of regulators and operators of such infrastructure, while civilian actors cannot manage the associated security implications alone. Participants therefore stressed the need for shared threat assessments, joint exercises and agreed playbooks between militaries, regulators and critical infrastructure operators, so that emerging technologies are woven into a coherent European defence ecosystem rather than remaining a patchwork of disconnected experiments.

Ideas to take forward

- **Treat capability as an ecosystem, not a product:** Design drone and counter drone policy around the full chain – detection, C2, doctrine, training, industry and feedback loops – rather than platform procurement alone.
- **Use procurement to beat fragmentation:** Make EU and collective funding conditional on joint procurement, interoperability and open architectures, and rationalise existing initiatives around a few high impact capability tracks.
- **Treat Ukraine as a co architect of Europe’s drone ecosystem:** Establish structured EU–Ukraine partnerships on drones and unmanned systems that combine co development, co production, training and doctrinal exchange, backed by tailored finance to de risk joint ventures and scale proven wartime solutions.
- **Modernise rules and standards for speed and modularity:** Shift to modular, open, update friendly standards and certification processes that can absorb fast innovation and are informed by real combat and operational experience.
- **Build a coherent ecosystem for emerging technologies:** Fully embed drones and emerging tech into defence planning, capability development and exercises, and create a network of unmanned systems technology hubs linking militaries, industry, startups, researchers and critical infrastructure operators around shared ranges and innovation programmes.
- **Strengthen civil–military and multisector cooperation:** Develop joint preparedness frameworks, crisis response protocols and regular multi actor exercises that bring together armed forces, civilian authorities, regulators and private operators of critical infrastructure, so Europe can anticipate and respond to drone enabled threats as a single integrated system.



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