From Drone Strategy 2.0 To a Trusted EU Drone

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The European Union has already built one of the most advanced civilian regulatory frameworks for drones in the world. Harmonised EASA rules based on a risk-based approach, growing certification pathways, and the gradual rollout of U-space all aim to enable large-scale drone operations, including cross-border. However, from 2023 to 2026, the policy focus has significantly shifted: The European Commission began to increasingly emphasise more resilience, counter-drone capabilities (C-UAS), and defence readiness. It moves away from a sole focus on market expansion and innovative mobility. The February 2026 EU Action Plan on Drone and Counter

Drone Security illustrates this change by proposing initiatives like an EU trusted drone label, a future Drone Security Package (2026), a counter-drone centre of excellence, and faster testing and industrial deployment. Meanwhile, the EU is enhancing its defence industrial base via tools like the European Defence Industrial Strategy (EDIS) and the European Defence Industry programme (EDIP), while also increasing collaboration with Ukraine on defence innovation, especially in drone technology, by building on the expertise Ukraine acquired in that field since Russia's 2022 full-scale invasion.

However, significant gaps still exist in the EU's drone readiness. Those gaps go from broken detection and response systems to supply chain dependencies, interoperability problems, governance of autonomous systems, and broader societal acceptance.

What the EU has already built: Regulation, U-space, certification, and funding

The EU's strongest achievement, as often, lies in regulation. The EASA framework provides a harmonised system across Member States. This framework is structured around three risk-based categories—*open* (low risk)*, specific* (medium risk)*, and certified* (high risk). This approach aims to ensure safety without renouncing innovation, through standard scenarios and simplified compliance mechanisms.

Market clarity has also improved through product regulation. Since January 2024, drones must carry class identification labels (C-labels) to operate under standard scenarios. EASA has developed Special Conditions (SC) for light drones, allowing more complex and higher-risk operations under aviation-grade standards.

A second major pillar is U-space, the EU's framework for drone traffic management applicable since January 2023. This regulation is essential for scaling operations such as beyond visual line of sight (BVLOS) flights and urban logistics. U-space regulation also includes provisions for cross-border operations. The first U-space service provider was certified in March 2025, which marked a move from regulatory design to real operational deployment.

Finally, on funding, the EU has supported drone development mainly through air traffic management programmes such as SESAR and research funding under Horizon Europe. Demonstration projects like U-ELCOME have tested U-space deployment in real-world conditions across multiple Member States. Other funding paths are also being developed, such as the Commission's commitment in its EU Drone Action Plan to invest EUR 200 million over the next two years in drones and counter-drone technologies through the European Defence Fund (EDF).

2024: A structural shift towards security and defence

Since 2024, the EU drone strategy has seen a move towards prioritising security and defence. This change represents a swift intensification driven by current international geopolitical shifts, hybrid threats, and the experiences gained from Ukraine.

EDIS marks the first comprehensive EU-level defence industrial policy. The strategy focuses on joint procurement and industrial readiness. Its financial branch – EDIP – aims to enhance defence production capacity and boost the EU's technological resilience.

The most significant development, however, is the Action Plan on Drone and Counter Drone Security. It recognises the evolving threat landscape from criminal misuse to hybrid and military-style attacks and highlights the increasingly blurred line between civilian and military drones. The Action Plan calls for stronger EU coordination, given the inherently cross-border nature of drone incidents.

The EU is also leveraging the war in Ukraine as an innovation accelerator. Initiatives such as BraveTech EU aim to co-develop and deploy defence technologies, including drones, in close cooperation with Ukraine.

What the EU is still missing: capabilities, interoperability, governance and supply chains

Despite the existing policy framework, the EU drone landscape still faces several structural weaknesses. First, counter-drone capabilities on the continent are fragmented with no fully integrated system to detect, identify, and neutralise drones across Europe.

Then, advancements in technology, such as system autonomy, AI, and drone swarms, are progressing more rapidly than governance frameworks can keep up. This leaves regulatory elements like certification, regulation, and operational standards for autonomous systems still unclear.

Supply chains remain fragmented and face major dependencies. The EU drone ecosystem relies heavily on third-country components for sensors, batteries and critical materials, particularly from China.

Fourth, the regulatory environment is becoming increasingly complex and difficult to navigate. Export controls on dual-use technologies, cybersecurity requirements and data governance rules create compliance challenges for EU industries, and the administrative compliance is often heavy for SMEs and scale-ups.

Is the EU going in the right direction?

From a general perspective, the EU's approach is coherent: it recognises that security is a prerequisite for market development. Strengthening counter-drone capabilities is not only a defence issue but also a condition for public trust and commercial deployment.

From a strategic perspective, developing drone and counter-drone capabilities is increasingly unavoidable, and the EU did not have much choice. Drones have become a defining feature of modern conflict and a growing tool in hybrid threats.

Economically, the sector offers significant growth potential. But there is a risk that the civilian market becomes overly securitised, which could lead to undermining innovation and commercial applications, and labelling drones as a purely defence product – hence making public acceptance more difficult in the future. Additionally, fragmentation in production, development and procurement remains strong in the EU.

A Necessary but Incomplete Strategy

Even though the EU has made significant progress in building a regulatory and industrial foundation for drones and shifted its narrative to a security-oriented strategy for its drones, key gaps remain. Addressing these issues will determine whether Europe can become a global leader in drone technologies or remain dependent on external actors.

Ultimately, the question is not only whether the EU should develop sovereign drone capabilities, but how to do so in a non-fragmented way that can both ensure funding and pave the way for a broader and more comprehensive EU air strategy.