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From:	General Secretariat of the Council
To:	Delegations
Subject:	AOB for the meeting of the Transport, Telecommunications and Energy Council on 30 November 2026 European Civil Drone Market - Information from The Netherlands, Belgium, Bulgaria, Croatia, Cyprus, Denmark, Estonia, Germany, Greece, Finland, Latvia, Luxembourg, Malta, Poland, Portugal, Romania, Slovakia, Slovenia and Spain

If the common European civil drone market wants to survive, urgent action is needed

Last year Belgium, Bulgaria, Croatia, Czechia, Estonia, Greece, Latvia, Lithuania, Luxembourg, Malta, The Netherlands, Poland, Romania, Slovakia, Slovenia, Spain and Switzerland called on the EU for reform of the regulation to unlock the European drone market. Without any result thus far. Now the need for action becomes more urgent and perhaps we are already too late. If we don't act now the European market will continue to be dominated by drones from outside the EU. How did it come this far?

Why did we create European UAS rules?

In 2015 the European Union decided that the European drone market would be stronger if we would have common European rules instead of national UAS rules. At that time the vision was that thousands of enterprises, mostly Start-ups and small and medium enterprises (SME), in the European Union would develop, manufacture and use drones in infrastructure monitoring, aerial mapping and many other industries. Mass production and miniature electronics could make drones cheap enough to be accessible to individuals. A harmonised European drone market would subsequently create a large number of jobs.

Since then the European Commission has been establishing a comprehensive EU civil drone policy. In 2021 EASA adopted rules on drone operations and products, followed by three Implementing Regulations on U-space, enabling the development of safe and complex drone operations in the European aviation system. These measures made the European Union the first region in the world with a comprehensive legal framework for digitalised unmanned aviation. This made Europe the leading region in the world in the development of the drone market.

How did the European drone market develop since then?

Drones represent the fastest growing sector in aviation today. Over the last five years, the sector has seen rapid growth, with more than 2 million registered drone operators in Europe. Drones improve European productivity, create innovative companies and high-skilled jobs, and shape the future of aviation in areas such as infrastructure inspection, precision agriculture, emergency response, public safety, and logistics. Drones will also contribute to Europe's sustainable development inter alia as drones enable a modal shift towards less resource- and emission-intensive modes of aviation.

These developments look great. However, they do not represent the growth that the European Commission anticipated from a common European market. Instead, the drone manufacturing and drone services civil markets grow at a rate below their potential. While providing the necessary securing, standardization and access to airspace, regulations currently result in significant costs and delays: for drone companies (who prepare applications for operational approvals); for civil aviation authorities (who assess and approve those applications); and for EASA (who certifies aircraft systems).

Building on the European regulation, the European Commission set out a pioneering vision for a competitive civil drone market through its Drone Strategy 2.0[1] in 2022. The Commission acknowledges that operators struggle to conduct complex drone operations, for example beyond visual line of sight, as the required safety mitigations are often too difficult and expensive for individual operators to implement. To address this, the Commission introduced a series of flagship actions aimed at advancing the European drone industry and technology. However, several of these actions remain largely unimplemented[2]. As a result, the expected economic, societal and security benefits of the sector have not yet been realised.

[1] European Commission: Drone strategy 2.0 (Published on 6 September 2023). URL: https://www.eesc.europa.eu/en/news-media/press-summaries/drone-strategy-20.

[2] A Member States' analysis of the Drone Strategy 2.0 implementation shows that roughly 20% of the 19 flagship actions have been completed, around 40% are currently underway, and the remainder have not yet started

Due to this, the European position in the global civil drone market has weakened. The global market is driven by non-European players, which creates an undesirable strategic dependency and undercuts the EU open strategic autonomy. Both leading European companies and start-ups face increasing setbacks, and private investment in drone technologies is declining. Start-ups and SMEs bear costs of regulatory compliance to EU regulations, with occasional inconsistent implementation by Member States[3], long approval and certification procedures and administrative burdens[4]. Drones are already operating at scale in other countries outside the EU. This prompts European entrepreneurs to seek financing from US investors and to expand into non-EU markets.

EASA has already taken action by spearheading a major push for regulatory simplification and streamlining, in cooperation with stakeholders. A number of simplification packages and regulatory levers are in the final stages of approval and will be implemented in the coming months. This is already a major step forward. But that might not be enough to speed up developments.

Which actions should we take at the European level?

1. Build strong leadership and commitment to steer the sustainable development of the drone market in the EU.

a. Closer cooperation between Commission and Member States. Create a strategy implementation team.

b. Enhancing public acceptance of the European drone economy, taking into account environmental protection standards.

c. Develop a European low altitude economy strategy.

d. Promote common civil-military technological foundations and standards while preserving different legal frameworks and operational requirements.

e. Reduce critical dependencies, strengthen European supply chains and ensure both production capacity and the ability to scale to mass deployment.

The EC and some Member States should form a strategy implementation team for Europe which will execute these actions. Under their leadership the EU can speed up the sustainable development of the European drone market. With a strong home market, European industry is able to thrive at the global level and can compete with other global regions.

This team should ideally be created by February 1, 2027.

[3] e.g. approval of BVLOS operations or national implementation strategies for U-space infrastructure

[4] Scarce resources at EASA and significant certification costs hinder drone manufacturers to achieve drone design verification efficiently

2. Roll-out the European e-conspicuity strategy

To further enhance safety and support the wide-scale uptake of drone operations, conspicuity technologies should be actively promoted and supported. This includes collecting data to better understand performance capabilities of new technologies (e.g. ADS-L) and funding adequate and interoperable technologies and flight trials to validate their combined performance under real conditions. It also requires investments in the necessary ground infrastructure.

To address evolving security threats, it is necessary to ensure resilience against GNSS outages, jamming, spoofing, and cyberattacks, while taking into account national security interests and military airspace requirements.

This strategy should ideally be drafted by July 1, 2027 for further discussions in the EASA Committee.

3. Make the regulatory framework easier to use in practice.

a. Make the specific category even more practically feasible for industry and NAAs by creating subcategorization with modular requirements for man, machine, and organization, relying on a pragmatic application of SORA.

b. Make Standard Scenarios and Pre-Defined Risk Assessments even more practically usable

Simplifying the specific category will reduce the regulatory and financial burden for industry. Furthermore, it will enable states to reduce the time needed to speed up the operational approvals. Finally it will support the harmonised implementation of the regulation in the Member States, opening the common European market for industry. This should be one of the EU omnibus programs.

A proposal for simplification should ideally be drafted by September 1, 2027 for further discussions in the EASA Committee.

4. Implementation of U-space in Europe

Despite best efforts from Member States no U-spaces have materialized, nor is there a clear horizon towards scaled implementation. Meanwhile heightened hybrid threats have expanded the question of managing airspace from a matter of capacity & safety with security & resilience. U-space could strengthen the current security and resilience needs, while continuing to support civil operations.

In order to achieve the goals of U-space a new approach is needed to achieve the objectives set out in the U-space regulation, which recognizes the complexity of implementation and the new role of U-space as resilience against hybrid threats. The European Commission should work together with frontrunner Member States & local authorities like cities and ports to strategically role out U-space to create momentum across Europe.

This approach should provide more flexibility and phased steps towards full implementation. The European Commission should actively involve Member States to jointly develop their implementation approaches. With extensive knowledge of airspace, public consultation, and practical implementation Member States are uniquely positioned to support this effort.

A proposal for this new approach should ideally be drafted by April 1, 2027 for further discussions in the EASA Committee.

5. **Ensure resources synchronization in EU institutions to avoid bottlenecks**

To properly support the aforementioned actions, the European Commission and EASA should urgently ensure that the European resources are coordinated to meet the industry demands. The European Commission needs an effective usage of its staff to lead the European developments. EASA needs to support the new technologies and to meet the rising demand for complex operations. The Commission could encourage the Member States to do a similar synchronization.
These resources must be considered as support to investments and growth, not as administrative costs.

In conclusion

In this paper we have outlined the main issues, root causes and effects that are relevant to the European drone market. We propose actionable steps that are needed for Europe to move forward. Europe's chances to keep an equal footing at global level depend on our willingness to double-down on the implementation of these actions.