Dronetex: Lessons Learned from Building an Industry-Led Counter-UAS Solution

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The Drone Defence Coalition

In October 2025, Rasmussen Global launched the Drone Defence Coalition ("*Dronetex*") as **an industry-led initiative** to respond to the growing threat that unmanned aerial systems (UAS) pose to Europe's skies. The coalition brings together six European and Ukrainian defence technology companies – **DefSecIntel Solutions** (Estonia), **Weibel Scientific** (Denmark), **Marduk Technologies** (Estonia), **Zvook** (Ukraine), **DeltaQuad** (the Netherlands), and **TYTAN Technologies** (Germany) – to develop a **modular, layered counter-UAS solution** at the tactical level.

Within nine months of establishment, the Dronetex **coalition built its first collaborative prototype and conducted a successful live demonstration** at the UAS Test Centre in Odense, Denmark, in May 2026. The demonstration showcased an end-to-end counter-UAS solution across the **detection**, **identification**, and **interception layers within a single operational framework**.

This document outlines **key lessons learned from the conception, development, and execution** of a fully industry-driven defence initiative delivered on a pro-bono basis.

Lessons Learned

Industrial Coalitions Require Anchors

While **start-ups and scale-ups are critical drivers of innovation**, particularly well-positioned to adapt to the short innovation cycles required in the UAS domain, they do require **industrial anchors to deliver complex, integrated systems** due to their comparatively limited resources and, at times, operational experience. More **established companies – primes -** also typically benefit from longstanding partnerships with institutional actors, providing them with more direct access to decision-makers.

The transition from concept to operational capability requires the involvement of **established industrial actors capable** of assuming responsibility for system integration, programme management, and keeping momentum.

Crucially, however, the **role of industrial anchors should not be confined to prime contractors**. Defence policy discussions are too often focused on contrasting the contributions of smaller actors with those of large incumbents, while overlooking the **strategic value of mid-sized companies**. These actors combine the agility of start-ups with the industrial scalability, technological maturity, and operational experience required to underpin complex, deployable capabilities.

Within the coalition, the presence of capable mid-sized companies ensured that the project moved **beyond a set of individual mature technologies towards a coherent integrated system**.

Integration is the Core Capability

The decisive factor in counter-UAS effectiveness lies **not necessarily in individual components but in their effective integration**. Command-and-control (C2) architectures, data fusion, and information management systems are the critical enablers that allow separate technologies to function as a coherent operational capability.

The *Dronetex* prototype demonstrated that even highly capable individual systems deliver limited operational value if they are not seamlessly integrated. Conversely, **a well-integrated system can generate disproportionately greater impact by enabling coordinated detection, identification, and response cycles.**

Moreover, **redundancy** is not optional but a **core requirement of operational effectiveness**. Even a minimum viable counter-UAS system must **incorporate multiple, overlapping sensors and neutralisation methods** to ensure resilience across a wide range of operational environments and threat scenarios. No single detection or mitigation solution can guarantee consistent performance.

Therefore, the focus should not only be on the development of standalone technologies but also on the **integration of existing capabilities into a coherent system**.

Persistent Peacetime Mindset Limits Capability Development

The development and testing process revealed structural constraints within European defence ecosystems that still reflect a **peacetime mindset in our continent**. Limitations on testing conditions, including restrictions on kinetic interception even in dedicated UAS-testing facilities, constrain the ability to validate systems under realistic operational conditions.

These **constraints slow down capability development and create a gap between testing performance and real-world operational requirements**. In a threat environment characterised by rapid technological adaptation and increasingly sophisticated UAS, this gap carries significant operational risk.

This experience points to the need for **more flexible and representative testing frameworks** that enable full-spectrum evaluation of advanced defence capabilities, including those involving kinetic effectors.

Procurement Systems Are Not Fit for Purpose

The speed at which *Dronetex's* first prototype was built **clearly contrasts with the speed of delivery achieved by an industry-led initiative and the timelines associated with top-down institutional and governmental processes**. The coalition was able to deliver a functional, integrated prototype within **nine months**, using its own resources and operating outside formal institutional and governmental frameworks.

While this timeline is already compressed compared to traditional cycles, a **disproportionate share of time and resources was absorbed by partner identification and onboarding, regulatory and administrative hurdles**, and overall **programme coordination**. The **technical integration itself was completed in just 2.5 months**. With more streamlined processes and a more enabling regulatory environment, **delivery timelines could be compressed significantly.** This applies even more in a tender-based setting, where committed partners can allocate dedicated resources from the outset.

This stands in direct contrast to EU and national procurement systems, which remain characterised by **lengthy timelines, rigid structures, and limited capacity to accommodate iterative development or modular integration**. As a result, there is a growing misalignment between the pace of technological innovation and the mechanisms used to acquire and deploy new capabilities.

Pan-European cooperation is a prerequisite but not an obstacle

The *Dronetex* coalition demonstrates that it is possible to bring together **six companies from five different countries to coordinate, prepare, and execute complex tasks when driven by a clear demand and shared vision**.

To remain competitive in developing next-generation defence technologies against competitors such as the United States, China, and Russia, **Europe must accelerate and deepen collaboration between governments and industry**. This will require a willingness on both sides to accept trade-offs in pursuit of collective capability and to **invest in more ambitious models of cooperation and joint development**, even where these demand significant resources.

Such cooperation is achievable within compressed timelines, provided it is **enabled by agile, decentralised organisations and a dedicated coordinating force** to drive alignment, sustain momentum, and deliver results.

Conclusion

The success of the *Dronetex* coalition demonstrates that **European and Ukrainian industry can deliver integrated, operationally relevant defence capability within short timelines when operating outside traditional institutional constraints**. However, it also exposes persistent structural limitations in Europe's defence innovation, testing, and procurement frameworks.

Addressing these gaps will require four main policy responses: (1) **a shift towards capability integration** as the organising principle, (2) stronger linkages between **start-ups and established industrial players to bridge the gap between technological development and operational delivery**, (3) better **adapting testing environments to the realities of contemporary operational contexts**, and (4) **planning and procurement frameworks that enable faster, more flexible acquisition**.

Addressing these limitations will be essential to ensuring that Europe can respond effectively to emerging threats and maintain credibility as a provider of advanced defence capabilities.