Drones: The Army Excels in Pilot Training, but Where Does the Industry Stand?

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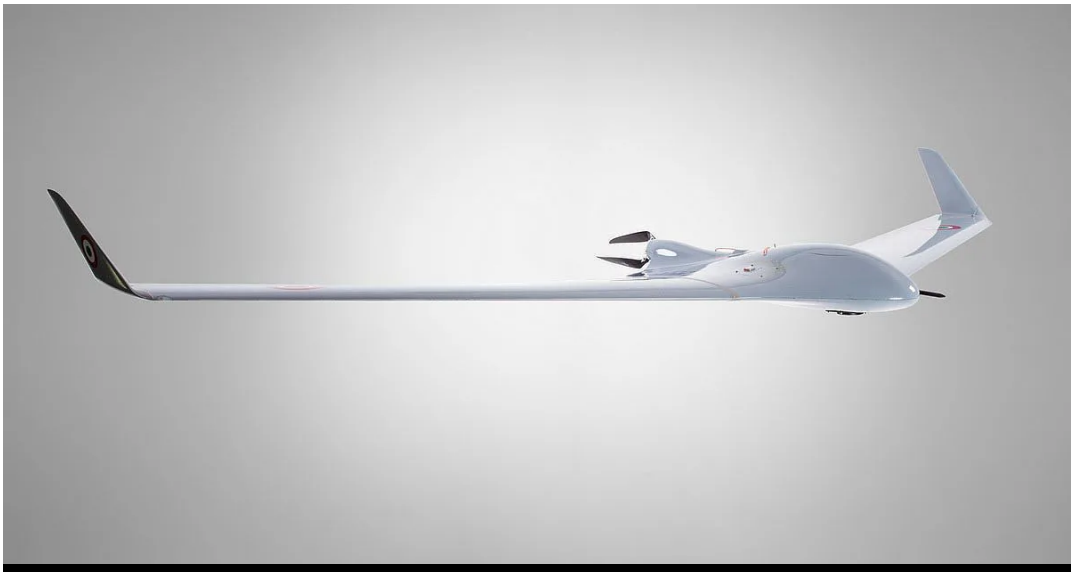
In recent years, Europe has visibly accelerated the production of light drones: from pocket-sized **micro-UAVs** used by patrols and police forces, to **mini-UAVs** (often hand-launched or catapulted) for reconnaissance, surveillance, and tactical support. Two drivers are pushing this: strongly growing military demand and the **need for industrial sovereignty**, meaning reducing foreign dependencies on components and production lines.

Micro and mini drones: what are we talking about. There is no single definition, but to understand: **Micro** are very light, easily transportable platforms (often multirotor), designed for **short-range observation**; **Mini**, on the other hand, are light but more **tactical** drones, with greater **autonomy** and **payload**, often **fixed-wing** or **VTOL**.



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The main European “factories”: who really produces (and where)

Delair (France, Toulouse) – industrial-scale production: a textbook case when it comes to factories, with a dedicated plant, structured processes, and series capacity; Delair represents a European model of transitioning from prototype to repeatable batch, typical of mini-UAVs for ISR and governmental uses.

Quantum Systems (Germany) – rapid scaling and mass production logic: one of the European names most clearly pushing on **scale**, also thanks to partnerships and production initiatives linked to the operational context of recent years; here the key concept is the transition to “large” numbers, not just the “best” product.

Threod Systems (Estonia) – verticalization and internal production: a Baltic player with a defense setup, more compact than large groups but with a very “industrial” approach (internal production and subsystem integration), typical of those who want to control the supply chain and timing.

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Sky-Watch (Denmark) – tactical mini-UAS: strong recognition in the military mini segment, with solutions designed for real use; here the strength is not so much “making a drone,” but having a system already calibrated to operational requirements, robustness, maintenance, and procedures.

C-Astral Aerospace (Slovenia) – production and assembly in the EU: an important example because it shows how even small countries can keep the development, production, and assembly of fixed-wing mini-UAVs in Europe, with an essential but concrete industrial supply chain.

Edge Autonomy (Latvia, Riga) – large European plant: significant for its size and industrial presence on European soil; when there is a “large” plant, it often changes the ability to ensure continuity, spare parts, and production ramp-up.

Evolve Dynamics (United Kingdom) – domestic production and rapid iteration: in the micro/mini segment, many European actors are more “engineering-driven” than “factory-driven”; here the value is the ability to quickly update (software, links, resistance to disturbances) and deliver systems that evolve with the operational context.

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In summary:

- **France**: aerospace supply chain and “classic” plants (e.g., Toulouse area).
- **Germany**: industrialization and scaling (automation, production closer to “mass”).
- **Baltic and Northern Europe**: lean, verticalized players, often very close to military requirements.

The real **watershed** is no longer just the **quality** of the **drone**, but the **ability** to **produce** in **short** times, **ensure spare parts** and **maintenance**, **quickly update** against **countermeasures** and **jamming**, and **increase volumes** without collapsing on the **supply chain** and **testing**: in other words, **production** is not a **detail**, it is part of the **weapon system**.

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Final reflection: and Italy?

Here lies the point that deserves a national reflection: **it's good** that there is increasing talk about **training**, **procedures**, **units**, and **operational capabilities**, because without doctrine, drones risk remaining "**expensive gadgets**". But the real question is another: **where is the Italian micro/mini industry really?** The risk, in fact, is to build an excellent **employment** capacity while relying on a weak **production** capacity.

Before entering the proposals, it is worth setting three key points:

1) Widespread skills, but little scale

The skills are not lacking: in Italy, there is **design**, **sensors**, **software**, and **applications**. What appears more fragile is the leap towards the **factory**, meaning the ability to have:

- **replicable lines** and **processes**
- **quality** and **industrial certifications**
- **volumes** and **delivery continuity**
- **resilient supply chain** (critical **components**, **links**, **payload**)

Without **scale**, we remain an ecosystem of excellent **prototypes** and "**small batches**".

2) The risk: large users, small producers

In the short term, it may be understandable to purchase abroad (or integrate non-Italian platforms) for **operational** urgency. In the medium term, however, this can become a **dependency**:

- **updates**
- **spare parts**
- critical **components**
- evolution against threats (**EW**)

remain outside **national control**.

3) "Making a system" is the key word (but not enough)

Dozens of disconnected initiatives are not needed: resources need to be concentrated on a few **measurable** objectives, becoming capable of **serial production**, not just **demonstrating**.

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A constructive provocation: how to change course (and why it matters)

If Italy wants to count in the European **micro/mini** segment, practical **choices** are needed, not **slogans**:

- **Multi-year purchase programs** (not one-off), to invest in **lines** and **people**
- **Laboratory units/ranges** for testing and validation with **rapid** cycles, "**monthly**" and not "**biennial**"
- **Component supply chain**: **radio links**, **payload**, **resilient navigation**, and European/Italian **supply chain** where possible
- **Consolidation**: help **2–5** entities become real "**factories**", without dispersing resources on too many micro-players
- Real **dual use**: increase **volumes** also in the **civil** sector (infrastructure, emergency, agriculture), so that **production** does not depend solely on occasional orders

In summary, Italy risks **training** and **using** drones better and better (good), but **producing** little on **scale** (problem): the question that should guide the national discussion is clear, do we want to remain **clients of foreign technology** or become **European producers** in the segment that is booming?