



THE NATO COUNTER-UAS 2026 REPORT

NATO C-UAS 2026 REPORT



CONFIDENTIAL

IN DEPTH TECHNOLOGY REPORT

THE NATO COUNTER-UAS 2026 REPORT

The NATO Counter-UAS 2026 Report is the first cross-alliance mapping and analysis of Counter-Unmanned Aerial Systems (C-UAS) companies, technologies, funding, operational maturity, and kill-chain coverage across NATO and allied nations.



NATO C-UAS 2026 REPORT



"Drone threats are no longer a niche concern—they're the vanguard of warfare, demanding we invest urgently in counter-UAS capabilities to protect our troops and secure the electromagnetic battlespace against proliferating low-cost swarms."

DEFENSE INNOVATION INTELLIGENCE REMAINS FRAGMENTED. WE MAKE IT ACTIONABLE.

Procurement, R&D, and innovation teams face the same constraint: data exists but it's dispersed, qualitative, and months out of date.

- **Capability gaps are identified only after procurement cycles begin.**
- **Supplier maturity is tracked by anecdote, not verified TRL.**
- **Innovation and funding signals are siloed by country or command.**

Eärendil Innovation consolidates these blind spots into one coherent framework connecting technology, industry, financial and operational data into a single intelligence map of NATO's counter-UAS capability.

From fragmented data to strategic clarity.

A NEW INTELLIGENCE BASELINE; BEYOND LEGACY CATALOGUES AND CONSULTANCIES

	Jane's	Frost & Sullivan	Booz Allen / Avascent	EÄRENDIL INNOVATION	
Focus	Platform and system listings	Market forecasts	Bespoke strategic projects	→	Cross-alliance capability intelligence
Scope	Technical data only	Commercial segmentation	Classified / client-specific	→	Full spectrum (technical, corporate & operational)
Data Model	Descriptive text	Qualitative analysis	Proprietary models	→	Quantitative/ qualitative dataset & proprietary model (300+ firms, 1,000+ systems)
Access Model	Subscription	Subscription	Confidential contract	→	Pre-release institutional access
Update Cycle	Annual	Annual	Project-based	→	Continuous open-source
Use Case	Reference	Trend monitoring	Client deliverable	→	Procurement, R&D, and capability planning
Output	Articles & PDFs	Reports & charts	Strategy decks	→	Unified Dataset, Report & Charts, Strategy Deck

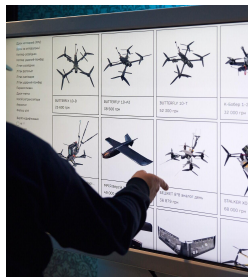
BUILT FOR DECISION. DESIGNED FOR EXECUTION.

The NATO Counter-UAS 2026 Report supports **real-world operational and strategic choices** across the defense ecosystem:



Capability Planning:

Identify validated, deployable technologies and TRL 7–9 suppliers for current and future programs of record.



Procurement Visibility:

Benchmark industrial capacity and supplier readiness across NATO, enabling faster, risk-informed acquisitions.



R&D Strategy

Direct limited budgets toward clusters with proven battlefield potential and technological convergence.



Investment & Industry

Assess dual-use ventures and acquisition targets aligned with alliance modernization priorities.

ABOUT

The NATO Counter-UAS Report 2026 is an independent, data-driven intelligence report produced by Eärendil Innovation, analyzing every relevant prime, neo-prime, and venture engaged in C-UAS development across NATO and partner nations.

It consolidates technical, corporate, operational, and financial intelligence into a single actionable framework — providing the first quantitative view of C-UAS capability development across the alliance.

WHO IS IT FOR

- **Defense primes and integrators** seeking insight into competitive positioning, technology partners, and capability gaps
- **Government and procurement bodies** assessing industrial readiness and alliance-wide C-UAS capability
- **R&D and innovation** offices tracking dual-use or disruptive technologies
- **Venture and private capital firms** evaluating defense-tech investments and acquisition targets



INCLUDED INTELLIGENCE MODULES

- **Master dataset:** 300+ companies, 1,000+ systems
- **Product data set:** 1,000+ systems and solutions
- **Technology clustering:** EW, Directed Energy, AI, Kinetic, C2, Sensor Fusion, and more
- **Kill Chain Coverage:** Detect → Track → Identify → Defeat
- **TRL banding, operational stage, battlefield validation** (including Ukraine)
- **Contract, partnership, and program-of-record** intelligence
- **Funding, valuation, and investor** mapping
- **Founder demographics:** veteran/non-veteran, team composition
- **Business model assessment:** software-defined, hardware, hybrid
- **Platform deployment & integration models**
- **AI Integration**
- **Market segments & expansion** status
- **Analytical report:** innovation density, TRL penetration, comparative benchmarking
- **Cross-linked product-level intelligence:** linking systems to companies, clusters, kill-chain phases, and operational stage

ANALYTICAL REPORT

REPORT & DATA SET

EXECUTIVE PACKAGE

STARTUP INSIGHTS

ANALYTICAL REPORT

Strategic Overview of NATO's Counter-UAS Ecosystem

The definitive 2025 analytical study mapping every major C-UAS technology, company, and operational trend across NATO and allied nations.

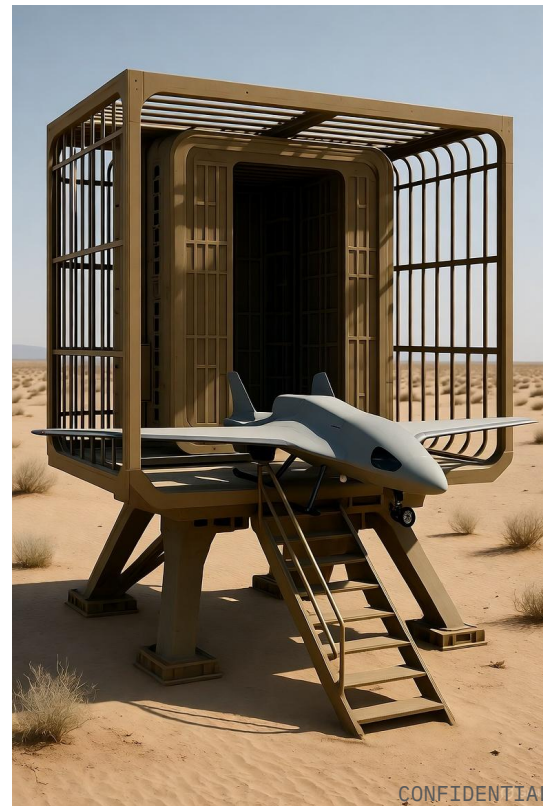
Delivers a complete strategic picture — from TRL progression and battlefield validation to capability distribution and funding trends.

Includes:

- 80–100 page analytical report (PDF)
- Technology clusters, TRL bands, and validation overview
- Innovation density and maturity benchmarking
- Contracts, partnerships, and funding analysis
- Strategic insight for capability planning and R&D alignment

Best for:

Primes, integrators, and government analysts seeking a clear, verified overview of the C-UAS ecosystem.



ANALYTICAL REPORT

REPORT & DATA
SET

EXECUTIVE PACKAGE

STARTUP INSIGHTS

ANALYTICAL REPORT + RAW DATA SET

Actionable Intelligence for Analysis and Benchmarking

Everything in the Analytical Report — plus the full master dataset covering 300+ companies and 1,000+ systems.

Designed for strategy, innovation, and M&A teams that need granular data for modeling, benchmarking, and due diligence.

Includes:

- Full analytical report (PDF)
- Master company dataset (Excel)
- Product-level dataset (Excel)
- TRL, contracts, funding, and partnership data
- Market segmentation and founder demographics

Best for:

Corporate strategy, innovation offices, and investment analysts conducting comparative assessments or supplier due diligence.

NATO C-UAS 2026 REPORT



ANALYTICAL REPORT

REPORT & DATA SET

EXECUTIVE
PACKAGE

STARTUP INSIGHTS

EXECUTIVE PACKAGE

Comprehensive intelligence suite - Report, Raw Data and Detailed Executive Presentation

The full analytical suite — combining the report, dataset, and a visual Executive Slide Deck summarizing every company, cluster, and TRL level.

Perfect for leadership briefings, capability reviews, or board-level presentations.

Includes:

- Full analytical report (PDF)
- Master & product datasets (Excel)
- Executive slide deck (PowerPoint, ~1 slide per company)
- Cluster-by-cluster benchmarking and visual summaries
- Ready-to-present intelligence for leadership teams

Best for:

Executive teams, strategy directors, and integrators requiring instant-use deliverables for decision-making or presentation.



STARTUP INSIGHTS DECK

Condensed information for Early-Stage Investors and Builders

A distilled version of the Executive Deck, optimized for venture and startup intelligence.

Includes company-by-company slides summarizing technologies, clusters, funding, and founders — ideal for deal flow and opportunity scouting.

Includes:

- Executive slide deck (PowerPoint)
- Technology clusters, TRL, and funding summaries
- Founder demographics and market segment overview
- 2025 market trend highlights

Best for:

Venture capital firms, defense-tech accelerators, and founders seeking competitive intelligence across NATO's C-UAS ecosystem.



“Decision-makers lack a unified, data-driven view of technology maturity and capability distribution across the alliance.”

Shape Capability Roadmaps With Data, Not Speculation

Every C-UAS program decision starts with uncertainty — who's building what, and at what maturity.

The NATO Counter-UAS Report 2026 transforms scattered information into a structured dataset: technology clusters, TRL maturity, battlefield validation, and funding sources.

Use it to align capability roadmaps with real-world progress, identify where your competitors are investing, and spot capability gaps before they appear in procurement cycles.

Identify Credible Suppliers and Partners



The report profiles **300+ companies** and **1,000+ systems** across NATO and partner nations — from primes to emerging neo-primes and startups.

For integrators and primes, it's a shortcut to identifying reliable subsystem partners before formal tenders begin.

For government and procurement offices, it highlights which suppliers are truly operational, and which are still in concept phase.

Direct R&D Budgets Toward Validated, High-TRL Technologies



R&D funding is often misallocated toward technologies with limited operational proof. The dataset breaks down Technology Readiness Levels (TRLs), Ukraine battlefield validation, and deployment stages for every major C-UAS product line.

This allows you to focus resources on proven, scalable technologies, and identify where new R&D can actually generate advantage — rather than duplicate existing efforts.

Benchmark Competitors and Acquisition Targets Before the Market Moves

The report delivers a full analytical comparison of innovation density, funding maturity, and contract penetration across NATO C-UAS companies.

For corporate strategy and M&A teams, it reveals who's gaining traction, which technologies are trending upward, and where valuations are diverging from actual field performance.

For venture and private capital, it maps which dual-use startups are closest to acquisition or scale-up inflection points.

WHY EÄRENDIL INNOVATION

WE DON'T THEORIZE. WE OPERATIONALIZE

Earendil Innovation delivers the research, intelligence, and strategic frameworks that move defense and dual-use innovation from idea to implementation.

We translate complexity into clarity.



NATO C-UAS 2026 REPORT



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CO-CREATE C-UAS CAPABILITIES & INTELLIGENCE WITH US



**For Defense Ministries
and capability offices**

INSTITUTIONAL PARTNERSHIP

Full Executive Package access
(report + all datasets + analysis)

Early access to draft
chapters/modules

2x private briefings or workshops
(virtual or on-site)

Ability to shape taxonomy or areas
of emphasis

Recognition as Institutional
Partner in the final report



For Primes and Integrators

MODULE SPONSORSHIP

Branding and acknowledgment on module
section and executive summary

Input session (non-editorial) on market and
tech focus areas

Case study/ product showcase in Report or
Deck

1x tailored intelligence brief for their leadership
team

Inclusion in alliance briefing deck

FROM DATA TO DECISION.

Eärendil Innovation provides multiple pathways for defense institutions and industry partners to shape and benefit from this research.

Tier	Ideal For:	Scope	Pricing (USD)	Key Outcome
Analytical Report	Analysts / Innovation offices	Full study	12,000	Strategic overview
Report + Dataset	R&D / Investment	+ Excel master dataset + Systems Dataset	20,000	Data-driven benchmarking
Executive Package	Leadership teams	+ Systems Deck + Consultation	30,000	Board-ready insight
Institutional Partnership	Ministries / Agencies	Co-development + workshops	45,000–60,000	Shape alliance framework
Module Sponsorship	Primes / Integrators	Sponsor thematic module	25,000–40,000	Strategic visibility

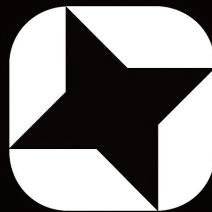
ABOUT EÄRENDIL INNOVATION



Earendil Innovation is a next-generation advisory redefining how nations, industries, and policymakers build defense capability in the new technology era.

We translate complexity into clarity — delivering insight that shapes policy, strategy, and technological advantage.

We don't observe change. We drive it.



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