

EU Regulations & Dual-Use Challenges

Balancing policy frameworks for civilian and defence applications of autonomous systems

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Who we are

logos at a glance

Founded in 1998, part of the **mci group** since 2012.

50

Consultants

25

Years experience in EU
advocacy

PRACTICES

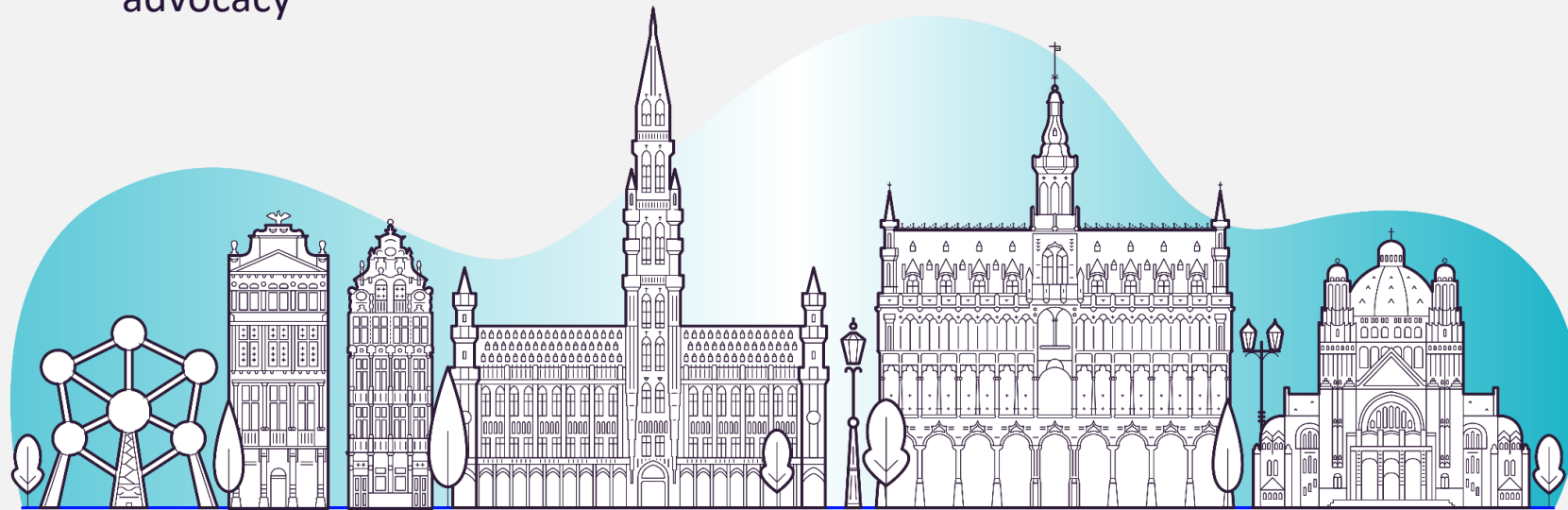
- Defence, Space and Aviation (DSA)
- Sustainability, Energy and Mobility
- Technology & Telecom

SOLUTIONS

- Advocacy & intelligence
- Association Management
- Communication
- Digital Engagement
- Industry & Policy Events

ADVOCACY SERVICES

- Public Affairs Strategy
- Policy Monitoring & Intelligence
- Outreach Programmes
- Comitology & Standardisation
- Audit & Strategic Consulting



logos DSA practice at a glance

Largest and most reputable Defence, Space & Aviation (DSA) public affairs practice in Brussels

15

Consultants

50+

Successful Client Missions

POSITIONING

- Embedded at the heart of the Brussels
- At the intersection of defence innovation, aeronautical strategy, and industry policy
- Supporting leading European players

INTELLIGENCE

- Anticipating regulatory dynamics
- Translating technological and operational realities into compelling narratives
- Securing durable outcomes

INFLUENCE

- We are where policy is made, not just discussed
- Our approach goes beyond policy tracking, we actively help shape policy
- Credibility built on trust



logos DSA practice leadership team



in Tomas Dimitrov

Deputy Executive Director, leading Defence, Space and Aviation practice

10+ years of experience in EU public affairs. Tomas is an expert in advocacy strategy with a clear focus on defence, space and aviation topics.

C-level companies and industry alliances rely on Tomas's savvy counsel and smart insights to successfully navigate through tough policy and political environments.



in Julien Bocquet

Associate Director, leading Defence, Space and Aviation practice

With 7+ years of experience in EU public affairs, Julien leads strategic advocacy missions for European companies and spearheads our C-level policy events.

His deep understanding of the EU policies and the decision-making landscape makes him a trusted and proactive professional, well-recognised within the EU bubble.

logos DSA practice leadership team



Marc Paoloni

Member of the Advisory Board

For 40+ years Marc has been at the heart of Brussels. He spent several decades as a journalist, before founding Business Bridge Europe and spearheading the European Space Conference. Marc is a highly respected Brussels insider whose professional network spans across European Commissioners, Ministers and Director Generals. Marc is a full member of the team providing invaluable insights and contacts for the team, while supporting in shaping policy narratives and influence strategies.



Luc Tytgat

Member of the Advisory Board

Luc Tytgat brings unmatched senior-level expertise and credibility at the highest levels of European aeronautics and aviation policymaking. With decades of experience at the heart of EU institutions, including as Executive Director of the European Aviation Safety Agency, he combines a deep understanding of regulatory and strategic frameworks with exceptional insight into how political decisions are shaped and implemented. His authority, discretion and strategic judgment make him a trusted interlocutor for policymakers and industry leaders alike, and a key asset in navigating complex aeronautics and aviation industrial policy environments.

logos DSA practice our clients

public affairs & strategic advisory



alliance management & technical support

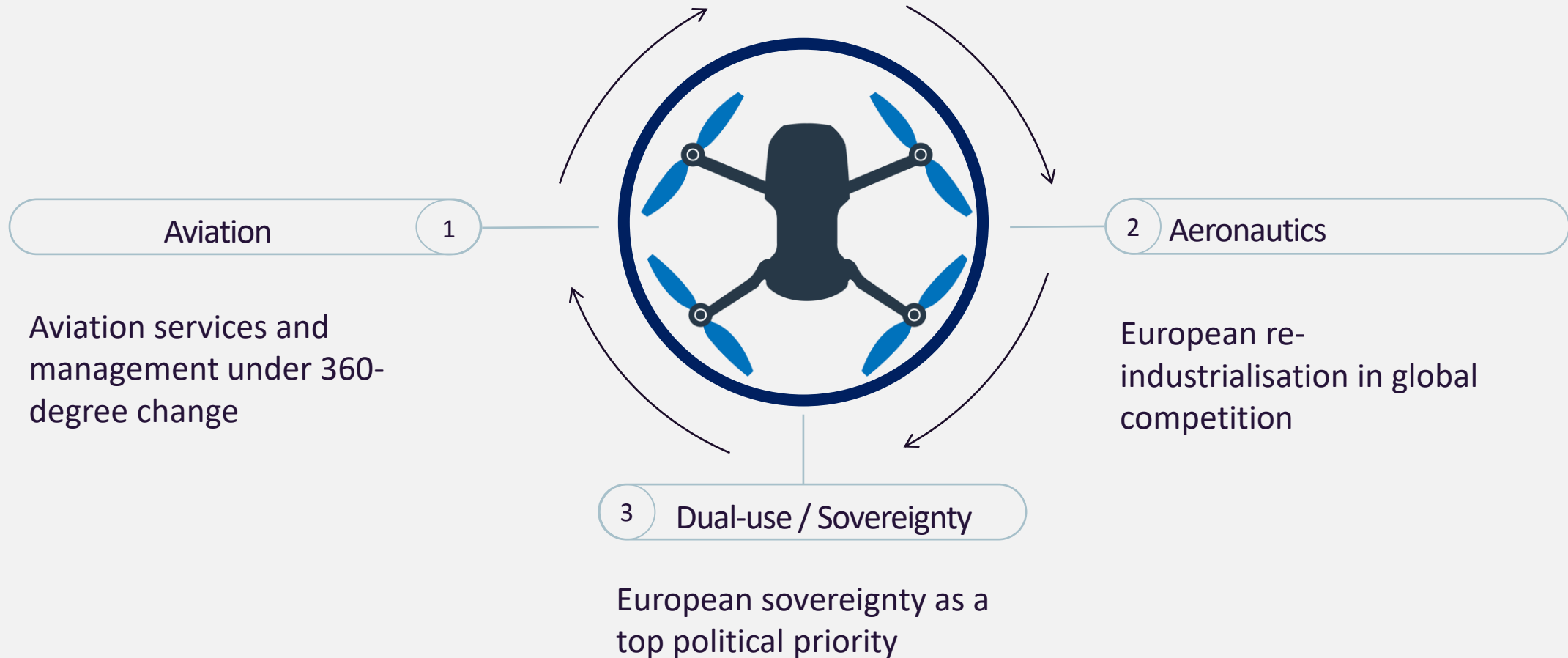


corporate communications & media relations



EU Policy trends

Introduction



EU Political Context - aviation

Placing VTOL and UAVs at the heart of the future policy on aviation:

- VTOL operations (and their “green transition”) gaining their place within the updated air services rules
- U-space implementation and certification of USSPs becoming part of a wider EU framework of drone and counter-drone security
- EU aviation services in global competition for advanced air mobility

EU Political Context – aeronautics



Aeronautics sector in-between digitalisation, greening and sovereignty

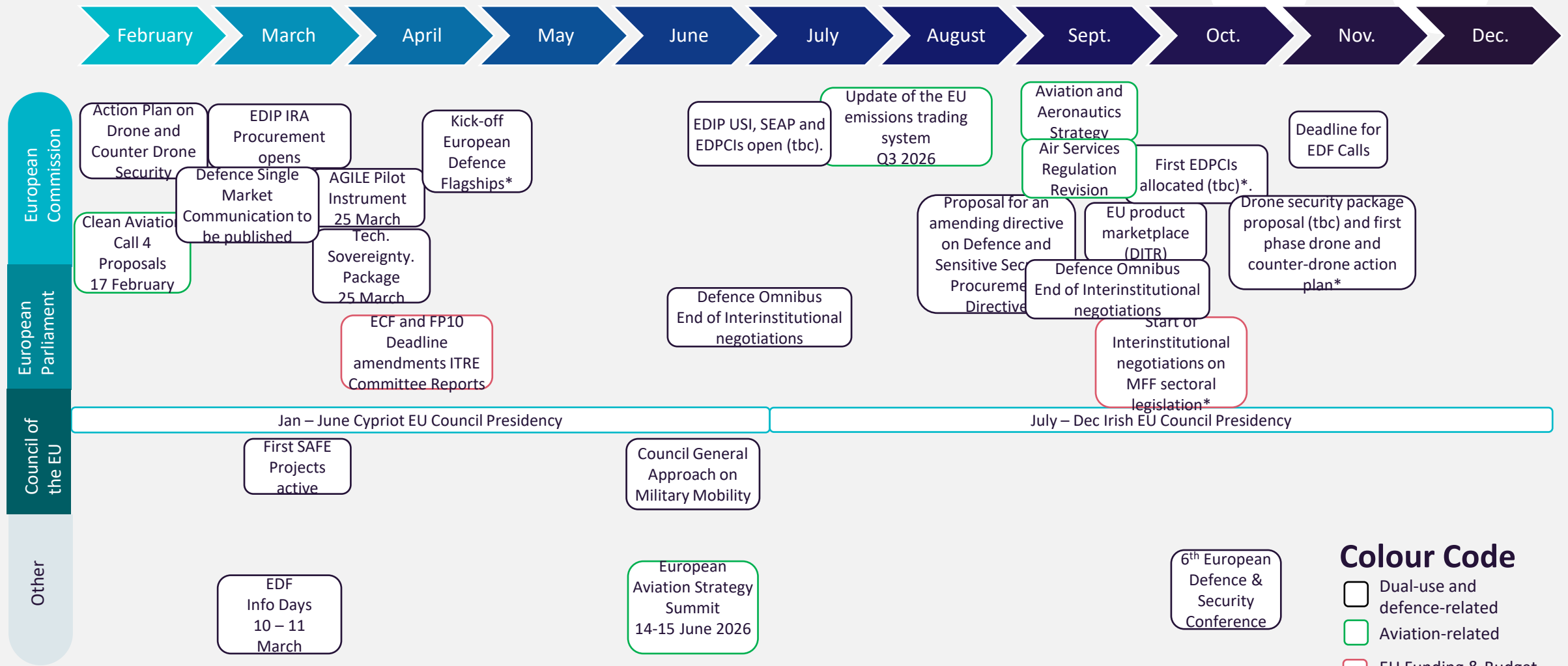
- Decarbonised aviation and hybrid technologies being recognised as a key pillar for the future of Europe's aviation and aeronautics sector
- European aeronautics sector under threat from global competition (mainly China)

EU Political Context – dual use

Prioritising strategic autonomy over sustainability:

- Evolving role of hybrid-electric propulsion systems and hybrid-electric VTOL in a new defence paradigm
- Evolving role of hybrid technologies in the upcoming EU civil-military industrial mapping and actions
- Broadening conception of “European strategic autonomy”, with the “buy European” concept increasingly translating into actions both in the civil and military sphere

EU Political Context Timeline



*tentative timeline building on intelligence gathered. Calendar might evolve depending on institutional work pace

aviation & aeronautics files at a glance

| File of Interest | Milestones | At stake |
|---|--|---|
| <p>Aviation and Aeronautics Strategy Expected Sept. 2026</p> | <p>The Strategy is currently at a drafting stage within DG MOVE, coordinating with the EC's Secretariat General.</p> <p>Public Consultation should soon open and informal inputs are also being collected.</p> | <p>The Strategy will tackle how the Aviation and Aeronautics ecosystem will be structured and the support that EU institutions can bring.</p> <p>It should revolve around 5 main axes:</p> <ul style="list-style-type: none"> - Competitiveness - Digitalisation and technological advancements - Green Transition - Security and Defence - Workforce and Skills |
| <p>EASA Basic Regulation Revision Not yet started</p> | <p>Preparatory work & consultations (expected within two years)</p> | <p>Mandate and functions of the European Union Aviation Safety Agency</p> <p>Airworthiness and Certification</p> <p>Evolution of the approach to unmanned aircrafts</p> |
| <p>Air Services Regulation Revision Expected Q3-Q4 2026</p> | <p>The Public Consultation closed in Nov 2025</p> <p>Commission proposal now expected in Q3/Q4 2026</p> | <p>Proposal content may affect:</p> <ul style="list-style-type: none"> - conditions for operating licences/market access (relevant to new VTOL operators) - pricing/display obligations for digital distribution - how the framework supports the sector's green transition |

aviation & aeronautics files at a glance

| File of Interest | Milestones | At stake |
|--|--|---|
| <p>U-space Regulation</p> | <p>Entered into force in January 2023</p> | <ul style="list-style-type: none"> - Stalled to no-implementation at the moment is pushing regulators and the industry to re-think the approach - Increased push towards member state implementation and oversight - Certification of USSPs is behind schedule causing risks of increased price for U-space services |
| <p>EASA ED Decision 2026/002/R And Commission Implementing Regulation (EU) 2025/111 on Continuing airworthiness rules for electric- and hybrid-propulsion aircraft and other non-conventional aircraft</p> | <p>Published on 3 February 2026</p> <p>Amendments to the AMC/GM to Commission Regulation (EU) No 1321/2014 and its annexes</p> | |

defence & security files at a glance

| File of interest | Milestones | At stake |
|---|---|---|
| European defence industry programme (EDIP) - ongoing | <i>This file has entered into force.</i> First procurement for the Industrial Reinforcement Act (IRA) opening Q1 2026. Following procurement for other elements (USI, SEAP, EDPCIs) to be agreed Q2 2026. | Business opportunity as industrial enabler (not prime). Strong fit in priority areas – drone and counter drone. |
| European Defence Projects of Common Interest (as part of the White Paper for European Defence) <i>ongoing</i> | European Commission and member States need to agree on EDPCIs (projects, governance, etc.) to open EDIP funding for these projects together with national funding – expected Q3 2026. | Business opportunity – EU funding coupled with national money opens for long-term contracts and will hold over the model to the next MFF. |
| Defence Omnibus’: 1. Permit-granting 2. EDF and REACH 3. Intra-EU Transfers <i>Legislative negotiations ongoing</i> | Currently in legislative process and soon to be closed, the aim for each Omnibus is simplify existing legislation to allow defence companies to have eased conditions to support industrial ramp up. Expected adoption and close of negotiations end Q2 2026. | Each file could create easier conditions to participate in funding or less strict conditions for participating in an EU programme. Impact tbc depending on final legal texts. |
| Simplification of defence and sensitive security procurement <i>ongoing</i> | Aims to address issues in implementing of existing legislation, this will review the legal framework. | Though it aims to address implementation issues it could align with the approach for a single market and change the premise for procurement in defence at EU level. |

defence & security files at a glance

| File of interest | Milestones | At stake |
|--|---|--|
| Action Plan on Drone and Counter Drone Security <i>presented</i> | Published on 11.02.26 it sets out the Commission's phased plan including milestones: Establishment of the EU Counter-drone Centre of Excellence, Launch of a drone and counter drone industrial forum, drone security package to be proposed by Commission and EASA, European Drone Defence Initiative (Flagship project) | Business opportunity and deeper integration into the EU ecosystem including long-term opportunity in the Drone Defence Initiative Flagship (depending on political support). |
| Military Mobility <i>ongoing</i> | Published on 19.11.25 it aims to ensure the rapid and seamless movement of military personnel, equipment and assets across Europe, in peacetime, crisis and conflict. It focuses on removing legal, regulatory and infrastructure barriers, harmonising procedures across Member States, and strengthening civil–military cooperation, while ensuring coherence with NATO efforts | Opportunity to partake in the joint drone framework and regulatory sandboxes with EASA, could benefit from dual-use transport corridors, more opportunities across Member-State capability projects which can feature in their MM plans. |
| Pilot instrument for agile rapid defence innovation (AGILE) <i>incoming</i> <i>25 March 2026</i> | It will propose activities with a short timeframe to allow better entry of innovative companies into the defence sector. | Opportunity to test and scale innovative defence technologies including Ascendance's capabilities and integrate to ecosystem. |

defence & security files at a glance

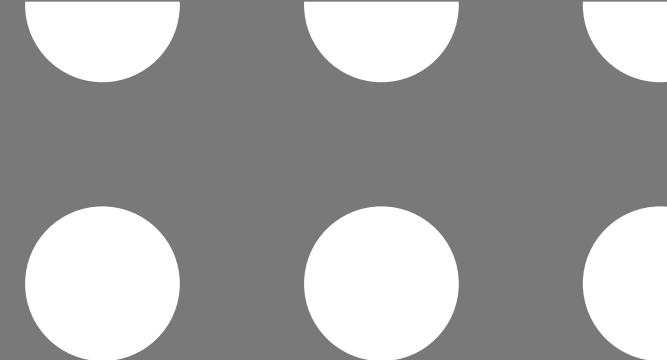
| File of interest | Milestones | At stake |
|---|---|---|
| Defence Industry Transformation Roadmap <i>launching actions</i> | Aimed to modernise and strengthen the EDTIB and integrating emerging and disruptive technologies. Q3 - Proposal for an amending directive on Defence and Sensitive Security Procurement Directive. Q4 – Marketplace for products developed with EU funding. | New file with a strong opportunity to engage and embed in the EU ecosystem. The Commission is keen to support non-traditional defence companies including drones and bring in Ukrainian capabilities. |
| EDF 2.0 <i>Not yet started</i> <i>(Under next MFF and ECF)</i> | Leading into the MFF, the EDF is expected to get a significant raise in funding. There will be a revision to EDF's projects, long-term planning and participation conditions. | New opportunities for Ascendance to obtain EU funding and be further integrated into the EU ecosystem. |
| Defence Single Market Communication – <i>Expected Q1 2026</i> | Not yet presented, will be presented in Q1. | Aims to reduce market fragmentation and barriers, for more cross-border operations and market access. Politically divisible (not all Member States support the concept). |

R&I and technology files at a glance

| File of interest | Milestones | At stake |
|--|---|---|
| <p>Clean Aviation Joint Undertaking Call 4 (Horizon Europe)</p> | <p>17 February 2026: Launch of Call 4 Proposals</p> | <ul style="list-style-type: none"> • Funding for hybrid-electric, hydrogen, regional aircraft, certification innovation • Opportunity to shape future propulsion & certification agenda as Clean Aviation member |
| <p>European Defence Fund Calls 2026-2027</p> | <p>Calls Opening Date 11 February 2026 Calls Deadline: 29 September 2026 EDF Info Days 10 - 11 March 2026 Ongoing preparation work of EDF Work Programme 2027</p> | <p>Opportunity to explore EDF 2026 non-thematic actions for SMEs & disruptive technology.</p> <p>Opportunity to influence for calls 2027 and the next iteration of the European Defence Fund under the European Competitiveness Fund of the next Multiannual Financial Framework 2028-2034</p> |

R&I and technology files at a glance

| File of interest | Milestones | At stake |
|---|---|---|
| <p>European Competitiveness Fund (ECF) <i>Ongoing</i> <i>Proposal presented in July 2025</i></p> | <p>The ECF aims to merge 14 programmes into a single €400bn+ investment powerhouse. The current proposal includes 4 main policy windows, 2 of which are of high relevance to Ascendance:</p> <ul style="list-style-type: none"> - Clean Transition Industrial Decarbonisation - Resilience and Security, Defence industry and Space. <p>The ECF is currently being discussed and negotiated in relevant Council working parties. The Cypriot EU Council Presidency will present domain-specific drafts (e.g. defence/space) to Member States in the relevant Council working parties.</p> <p>The European Parliament's lead Committee (ITRE) and associated Committees are respectively drafting their Report and Opinions on the file.</p> | <p>The European Competitiveness Fund is already subject to strong debates about the governance, the Fund allocations, and the European preference and eligibility criteria.</p> <p>Ongoing work on ECF will shape the accessibility and envelope of the Fund and its subsequent programmes valuable to Ascendance.</p> |



Ecosystem & stakeholders

Stakeholder power mapping at a glance

President
Commissioners
Cabinets
Directors-General
Deputy DGs
Directors
Heads of Unit



Ursula von der Leyen

Björn Seibert

Thomas Lunau

Stéphane Séjourné
EVP Prosperity and Industrial Strategy

Apostolos Tzitzikostas
Transport and Tourism

Andrius Kubilius
Defence and Space

Ekaterina Zaharieva
Startups, Research and Innovation

Bertrand L'Huillier
Head

Pierpaolo Settembri
Deputy

Simonas Satunas
Head

Anne Fort
Deputy

Ditte Jull Jorgensen
DG ENER

Magda Kopczyk
DG MOVE

Timo Pesonen
DG DEFIS

Kurt Vandenberghe
DG CLIMA

Marc Lemaître
DG RTD

Mechthild Wörsdörfer

Herald Ruijters
(Head of SAFE Task Force)

Lukasz Kolinski
Green Transition

Filip Cornelis
Aviation

François Arbault
Defence Industrial Programmes

Tomasz Husak
Defence Policy

Beatriz Yordi
Mobility

Joanna Drake
Clean Planet

Christine Berg
Aviation Safety

Maria de Las Flores
Single European Sky

Eddy Liegeois
Aviation Policy

Gzim Ocakoglu
Aviation Agreements

Polona Gregorin
Air, Rail, Water, Intermodal

Jane Amilhat
Clean Transport Transition



TRAN Chair
TRAN Vice Chairs
SEDE Chair
SEDE Vice Chairs
ITRE Chair
ITRE Vice Chairs

Elissavet Vozemberg-Vrionidi

Virginijus Sinkevičius

Sophia Kircher

Matteo Ricci

Marie-Agnes Strack-Zimmerman

Christophe Gomart

Mihai Tudose

Michał Dworczyk

Riho Terras

Borys Budka

Elena Donazzan

Giorgio Gori

Tsvetelina Penkova

Yvan Verougstraete

Relevant Agencies



Florian Guillermet
Executive Director



Raúl Medina
Director General



Axel Krein
Executive Director



Andreas Boschen
Executive Director



André Denk
Chief Executive



Paloma Aba Garrote
Director



How we work

Methodology

Proprietary strategic frameworks tailored to dual-use sectors

We deploy aviation, aeronautics and defence specific analytical models to anticipate regulatory direction, power dynamics and funding prioritisation well before formal decisions are taken.

Human-driven intelligence advantage

Through networking, our own high-level policy conferences, and proactive positioning in Brussels we capture weak signals, institutional shifts and emerging coalitions ahead of the curve.

Decision-grade intelligence, not information overload

We filter political noise into concise executive briefings, risk/opportunity matrices and clearly prioritised engagement pathways that directly support strategic decisions.

Embedded coordination with Ascendance's leadership and technical teams

Our Brussels-based practice ensures seamless alignment between policy developments, industrial strategy, compliance readiness and market positioning — turning influence into measurable advantage.