360iResearch

Drone Data Link System Market

Global Forecast 2026-2032

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1. Preface

1.1. Objectives of the Study

- Define the commercial roles of complete data-link systems, terminals and modules, support hardware, software, connectivity, and integration or lifecycle services, including how their contributions are distinguished within wider aircraft or network offerings.
- Identify which buyer qualification, interoperability, integration, lifecycle, and switching requirements must be satisfied before an included offering can be treated as a practical alternative for a specified end user and mission.
- Assess how connectivity technology, network topology, and link function relate to buyer requirements, without assuming that technology-category membership establishes commercial equivalence or deployment eligibility.
- Examine access conditions across visual-line-of-sight-only and beyond-visual-line-of-sight deployments, network-management arrangements, and spectrum-access categories, distinguishing product availability from permission to deploy.
- Determine how supplier-direct, distribution and retail, and reseller or integrator routes allocate contracting, integration, service, and lifecycle responsibilities among suppliers, intermediaries, and buyers.
- Establish the evidence needed to compare supplier capabilities within the accepted offering categories and to distinguish verified participation from broader aircraft, communications, or mission-related business.
- Frame prospective commercial choices through 2032 around explicit demand, qualification, access, and delivery conditions, using the historical, base, and estimated years consistently rather than treating category inclusion as proof of future procurement.

1.2. Market Definition

The Global Drone Data Link System market covers commercial hardware, software, connectivity, and integration or lifecycle offerings supporting communications between unmanned aircraft and associated control, mission, or network endpoints, including communications among aircraft. The included communication purposes are flight-management, mission-payload, and integrated flight and payload communications.

The offering perimeter includes complete data-link systems, terminals and modules, link support hardware, link-management and transmission software, connectivity services, and integration and lifecycle services. Data-link functions supplied within a wider aircraft or network system remain in scope; the wider system is not automatically treated entirely as a data-link offering.

The study includes noncellular radio, cellular, satellite RF, wired electrical, optical fiber, free-space optical, and hybrid multibearer communications. Both visual-line-of-sight-only and

beyond-visual-line-of-sight deployments are covered, together with customer-managed, provider-managed, and hybrid network management. Military, public-sector, commercial, nonprofit, and individual or household end users are included across the accepted mission applications, including cargo delivery and uncrewed passenger transport.

Complete aircraft, unrelated avionics and sensors, general-purpose upstream materials or infrastructure, and the downstream output of drone missions are adjacent activities rather than standalone data-link market deliverables. Their identifiable included data-link contributions remain within the study. The geographic boundary is Global; country-specific evidence provides context within that boundary rather than redefining the market.

1.3. Market Segmentation & Coverage

The accepted segmentation uses independent commercial lenses to describe the same market. Each axis answers a different question about an offering or deployment; the axes are not additive opportunities, and inclusion does not establish a particular supplier's capability or an offering's authorization.

Offering identifies the deliverable being purchased. Data Link Hardware includes Complete Data Link Systems, Data Link Terminals & Modules, and Link Support Hardware. Link Management & Transmission Software, Connectivity Services, and Integration & Lifecycle Services retain their distinct commercial roles even when supplied together. This lens supports analysis of product identity, service responsibility, and bundled coverage.

Connectivity Technology identifies the communication medium or combination of media. Noncellular Radio Communications comprises Analog Radio Links, Digital Radio Links, and Combined Analog & Digital Radio Links. The remaining categories are Cellular Communications, Satellite RF Communications, Wired Electrical Communications, Optical Fiber Communications, Free-Space Optical Communications, and Hybrid Multibearer Communications. Radio, wired, and optical offerings are all included; their classification does not establish equivalent buyer suitability.

Network Topology covers Point-to-Point Networks, Centralized Multipoint Networks, Decentralized Multipoint Networks, and Hybrid Network Topologies. It distinguishes the arrangement of communication participants, allowing commercial comparisons to account for network relationships without confusing topology with the communication technology or management model.

Link Function distinguishes Flight-Management Communications, Mission Payload Communications, and Integrated Flight & Payload Communications. It connects an offering to the communication purpose evaluated by the buyer, while retaining integrated offerings as a defined category rather than automatically duplicating them across separate functions.

Mission Application covers Intelligence, Surveillance & Reconnaissance; Combat Operations; Search, Rescue & Emergency Response; Inspection & Maintenance; Surveying & Mapping; Agriculture & Forestry; Scientific Research & Environmental Monitoring; Transport & Logistics; Media Production & Entertainment; Communications Relay; Education, Training & Technology Development; and Recreation & Sport. Transport & Logistics includes Cargo Transport &

Delivery and Uncrewed Passenger Transport. This axis identifies the purpose associated with demand for the link, not the entire downstream economic activity of the mission.

End User comprises Military & Defense Organizations, Civilian Government & Public Institutions, Commercial Enterprises & Service Operators, Nonprofit Institutions, and Individual & Household Consumers. It identifies the ultimate user context; an intermediary that purchases or integrates the offering is not automatically the end user.

Deployment Model covers Customer-Managed Networks, Provider-Managed Networks, and Hybrid Network Management. This lens separates responsibility for managing the network from ownership of the hardware, the communication medium, and the sales route. It directs attention to the responsibilities that must be resolved in a commercial arrangement.

Sales Channel distinguishes Supplier-Direct Sales, Distribution and Retail Sales, and Value-Added Reseller and Integrator Sales. It describes the route by which an offering reaches the buyer. Different organizations appearing along that route do not necessarily represent separate underlying commercial activity.

Operating Envelope includes Visual-Line-of-Sight-Only Deployments and Beyond-Visual-Line-of-Sight Deployments. Both are affirmatively within scope. The distinction establishes the deployment context for qualification and access analysis; it does not itself grant operating permission.

Spectrum Access covers Individually Licensed or Assigned Spectrum, License-Exempt or Generally Authorized Spectrum, Mixed Spectrum Authorization, and Non-Radio Links. This lens distinguishes the stated access context from connectivity technology and operating envelope. Non-Radio Links preserves the included non-radio communication offerings without forcing them into a radio-spectrum classification.

Table 1. Global Drone Data Link System Market Segmentation & Coverage

Segmentation	Coverage

Connectivity Technology	• Noncellular Radio Communications
	  o Digital Radio Links
	  o Combined Analog & Digital Radio Links
	  o Analog Radio Links
	• Satellite RF Communications
	• Hybrid Multibearer Communications
	• Optical Fiber Communications
	• Cellular Communications
	• Wired Electrical Communications
	• Free-Space Optical Communications

Deployment Model	• Customer-Managed Networks • Hybrid Network Management • Provider-Managed Networks

Table 1 - continued

Segmentation	Coverage
End User	• Military & Defense Organizations • Commercial Enterprises & Service Operators • Individual & Household Consumers • Civilian Government & Public Institutions • Nonprofit Institutions
Link Function	• Integrated Flight & Payload Communications • Mission Payload Communications • Flight-Management Communications

Mission Application	• Intelligence, Surveillance & Reconnaissance
	• Combat Operations
	• Recreation & Sport
	• Inspection & Maintenance
	• Media Production & Entertainment
	• Search, Rescue & Emergency Response
	• Agriculture & Forestry
	• Surveying & Mapping
	• Education, Training & Technology Development
	• Transport & Logistics
	  o Cargo Transport & Delivery
	  o Uncrewed Passenger Transport
	• Scientific Research & Environmental Monitoring
	• Communications Relay

Network Topology	• Point-to-Point Networks • Centralized Multipoint Networks • Decentralized Multipoint Networks • Hybrid Network Topologies

Offering	• Data Link Hardware
	  o Complete Data Link Systems
	  o Data Link Terminals & Modules
	  o Link Support Hardware
	• Integration & Lifecycle Services
	• Link Management & Transmission Software
	• Connectivity Services

Operating Envelope	• Beyond-Visual-Line-of-Sight Deployments • Visual-Line-of-Sight-Only Deployments
Sales Channel	• Supplier-Direct Sales • Distribution and Retail Sales • Value-Added Reseller and Integrator Sales
Spectrum Access	• License-Exempt or Generally Authorized Spectrum • Individually Licensed or Assigned Spectrum • Mixed Spectrum Authorization • Non-Radio Links

Sources & Evidence

1. FAA Certificate of Waiver and Authorization 107W-2025-02991 - Pinnacle Drone Light Shows

   · Taxonomy evidence: FAA waiver 107W-2025-xx.xx expressly concerns drone light-show operations and identifies their C2, transmission, and telemetry functions. Its stated effective period begins September xx.xx 2025; it establishes a specific entertainment demand setting, not separately priced link revenue or universal authorization. ([faa.gov](https://www.faa.gov/media/xx.xx))

   · Taxonomy evidence: The waiver identifies aircraft control links and real-time aircraft-status telemetry within the show deployment, independently supporting flight-management communications in an entertainment application. ([faa.gov](https://www.faa.gov/media/xx.xx))

   · Taxonomy evidence: The record identifies drone-show command-and-control software and its version as part of the documented system. This supports communications-software identity, not an independently purchased entitlement or inclusion of all show-planning software. ([faa.gov](https://www.faa.gov/media/xx.xx))

2. ITU-T Recommendation M.3391 (03/2025): Requirements for Smart Maintenance of Telecommunication Infrastructure Based on Unmanned Aerial Vehicles

   · Taxonomy evidence: ITU-T M.xx.xx approved March xx.xx 2025, recognizes UAV-based patrol supporting maintenance of outdoor telecommunications infrastructure. Its smart-maintenance scope supports inspection and condition-assessment demand; it does not independently establish drone-performed physical repair or attributable link sales. ([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-M.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items))

   · Taxonomy evidence: The recommendation provides a specialized infrastructure-maintenance demand setting. Treating that objective separately from generic surveying is an analytical primary-purpose rule, not a claim that ITU prescribes this complete market partition. ([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-M.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items))

3. Desider, Issue 199, June 2025 - Next-Generation Armed RPAS Protector Enters Service

   · Taxonomy evidence: The June 2025 government publication reports Protector entering service as an armed remotely piloted aircraft system, corroborating the combat-oriented demand setting without isolating communications expenditure. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/685bf0de0433072fce0e1001/desider_-_issue_199__June_2025.pdf))

   · Taxonomy evidence: The publication identifies the Royal Air Force as the operating defense customer for the remotely piloted program. This supports institutional buyer identity, not a supplier-market-share claim. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/685bf0de0433072fce0e1001/desider_-_issue_199__June_2025.pdf))

   · Taxonomy evidence: The record describes a multiyear Protector support contract. It establishes a sustainment purchase at aircraft-program level but does not disclose the included drone-link share, so it cannot resolve link-specific service allocation. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/685bf0de0433072fce0e1001/desider_-_issue_199__June_2025.pdf))

4. Congressional Record - Senate, February 5, 2024, Pages S356-S357: India MQ-9B Proposed-Sale Notification
   - Taxonomy evidence: The February xx.xx 2024 Congressional Record separately names ground data terminals, satellite earth stations, transceivers, and compact data links in the India MQ-9B proposed-sale notification. This independently identifies communications equipment within a wider aircraft package; it does not establish completed delivery or standalone prices. ([congress.gov](https://www.congress.gov/xx.xx/crec/2024/xx.xx/xx.xx/xx.xx/xx.xx/CREC-2024-xx.xx-xx.xx-pt1-PgS356-xx.xx.pdf))
   - Taxonomy evidence: The notification distinguishes named communications equipment from broader software, integration, and support elements, supplying a public procurement basis for distinguishing tangible hardware from service deliverables. It is not an exhaustive offering taxonomy. ([congress.gov](https://www.congress.gov/xx.xx/crec/2024/xx.xx/xx.xx/xx.xx/xx.xx/CREC-2024-xx.xx-xx.xx-pt1-PgS356-xx.xx.pdf))
   - Taxonomy evidence: Integration, software support, repair, engineering, and logistics are included in the proposed program. Their communications-only commercial value is not separated. ([congress.gov](https://www.congress.gov/xx.xx/crec/2024/xx.xx/xx.xx/xx.xx/xx.xx/CREC-2024-xx.xx-xx.xx-pt1-PgS356-xx.xx.pdf))
   - Taxonomy evidence: The proposed purchaser is the Government of India for a defense aircraft program containing identified communications equipment; proposed procurement is not proof of realized link revenue. ([congress.gov](https://www.congress.gov/xx.xx/crec/2024/xx.xx/xx.xx/xx.xx/xx.xx/CREC-2024-xx.xx-xx.xx-pt1-PgS356-xx.xx.pdf))
5. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
   - Taxonomy evidence: NIST's current UAS communications portfolio distinguishes licensed cellular communications from unlicensed communications in its public-safety research. This supplies independent drone-specific support for permission-class distinctions, not legal clearance of a particular deployment. ([nist.gov](https://www.nist.gov/ctl/pscr/research-portfolios/uncrewed-aircraft-systems))
   - Taxonomy evidence: The portfolio explicitly labels LTE and 5G communications as licensed within its research scope. The market category still requires the actual jurisdiction and underlying network permission for allocation. ([nist.gov](https://www.nist.gov/ctl/pscr/research-portfolios/uncrewed-aircraft-systems))
   - Taxonomy evidence: The portfolio independently recognizes unlicensed drone communications alongside licensed alternatives; research recognition does not verify every product's airborne-use compliance. ([nist.gov](https://www.nist.gov/ctl/pscr/research-portfolios/uncrewed-aircraft-systems))
   - Taxonomy evidence: NIST identifies transfer of both telemetry and sensor data for public-safety UAS communications. This supports distinct traffic functions but does not establish an indivisible combined-function commercial contract. ([nist.gov](https://www.nist.gov/ctl/pscr/research-portfolios/uncrewed-aircraft-systems))
   - Taxonomy evidence: The portfolio's stated demand setting includes disasters, emergencies, fire-related data collection, and wide-area search. ([nist.gov](https://www.nist.gov/ctl/pscr/research-portfolios/uncrewed-aircraft-systems))
   - Taxonomy evidence: NIST's UAS communications portfolio distinguishes single-link, point-to-point, multi-UAS, relay, and mesh configurations in its public-safety communications work. These are independent demand-side network distinctions, not supplier-specific product names. ([nist.gov](https://www.nist.gov/ctl/pscr/research-portfolios/uncrewed-aircraft-systems))
   - Taxonomy evidence: The portfolio explicitly recognizes point-to-point and single-link drone communications configurations. ([nist.gov](https://www.nist.gov/ctl/pscr/research-portfolios/uncrewed-aircraft-systems))
   - Taxonomy evidence: The portfolio explicitly recognizes multi-hop mesh behavior and multi-UAS communications, supporting a decentralized multipoint grouping independently of the underlying radio bearer. ([nist.gov](https://www.nist.gov/ctl/pscr/research-portfolios/uncrewed-aircraft-systems))

6. ETSI TS 122 125 V19.2.0 (2026-01): Unmanned Aerial System Support in 3GPP
   - Taxonomy evidence: The January 2026 specification covers UAV communications through 3GPP systems and identifies cellular access nodes carried by UAVs. Cellular bearer identity therefore need not imply a ground-based access node or public-network ownership. This post-base-year standard is category evidence, not 2025 sales evidence. ([etsi.org](https://www.etsi.org/deliver/etsi_ts/122100_122199/xx.xx/xx.xx.00_60/ts_122125v190200p.pdf))
   - Taxonomy evidence: The standard addresses 3GPP provision of UAV-controller communications and recognizes direct and network-assisted C2 communication. It also identifies cellular access nodes carried onboard UAVs, supporting cellular classification without equating it to terrestrial network ownership. ([etsi.org](https://www.etsi.org/deliver/etsi_ts/122100_122199/xx.xx/xx.xx.00_60/ts_122125v190200p.pdf))
   - Taxonomy evidence: An onboard radio access node provides connectivity to user equipment, independently supporting an airborne communications-platform use case. The standard does not disclose communications-relay market revenue. ([etsi.org](https://www.etsi.org/deliver/etsi_ts/122100_122199/xx.xx/xx.xx.00_60/ts_122125v190200p.pdf))
   - Taxonomy evidence: The specification distinguishes C2 communications from payload services. That supports function-based allocation while leaving commercial separability unresolved. ([etsi.org](https://www.etsi.org/deliver/etsi_ts/122100_122199/xx.xx/xx.xx.00_60/ts_122125v190200p.pdf))
   - Taxonomy evidence: Direct and network-assisted C2 relationships, including redundant links, are recognized separately from the underlying transport. Bearer, endpoint topology, and network responsibility consequently remain distinct analytical questions. ([etsi.org](https://www.etsi.org/deliver/etsi_ts/122100_122199/xx.xx/xx.xx.00_60/ts_122125v190200p.pdf))
   - Taxonomy evidence: The standard distinguishes the communications transport network from the UAV/controller relationship and allows redundant communications links. This supports keeping bearer and deployed topology as separate classification questions. ([etsi.org](https://www.etsi.org/deliver/etsi_ts/122100_122199/xx.xx/xx.xx.00_60/ts_122125v190200p.pdf))
7. UAS Operator Radio Licence Guidance - Ofcom
   - Taxonomy evidence: Ofcom distinguishes generally exempt drone radio equipment from equipment covered by a UAS operator radio license. The guidance also distinguishes terrestrial mobile-terminal exemption from the authorization required for airborne mobile use. This supports jurisdiction-specific allocation rather than a universal license status inferred from bearer name. ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/manage-your-licence/aeronautical/guidance/uas-operator-radio-licence-guidance.pdf?v=xx.xx))
   - Taxonomy evidence: The guidance distinguishes drone equipment operating under license exemption from equipment requiring a UAS operator radio license. It separately states that radio authorization does not replace aviation requirements.
   - Taxonomy evidence: The UAS operator radio-license framework includes mobile and satellite terminal access under specified permission conditions, supplying a drone-specific individual-license pathway. ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/manage-your-licence/aeronautical/guidance/uas-operator-radio-licence-guidance.pdf?v=xx.xx))
   - Taxonomy evidence: The UAS operator radio license provides a distinct spectrum-permission route for relevant drone equipment.
   - Taxonomy evidence: The guidance expressly separates radio authorization from aviation authorization. Spectrum permission cannot independently verify a VLOS or BVLOS deployment's flight approval. ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/manage-your-licence/aeronautical/guidance/uas-operator-radio-licence-guidance.pdf?v=xx.xx))
   - Taxonomy evidence: A drone using only exempt radio equipment does not require this individual UAS radio license, subject to the exemption's applicable conditions.

8. Quantum Technologies Are Changing the Face of Unmanned Aircraft Communications - NASA

   · Taxonomy evidence: NASA's January xx.xx 2020 account identifies an optical data channel in research intended for unmanned-aircraft applications, with hardware flown on a Twin Otter research aircraft. It supports the named optical technology but is not evidence of merchant availability or a commercial deployment on an unmanned aircraft. ([nasa.gov](https://www.nasa.gov/aeronautics/quantum-technologies-are-changing-the-face-of-unmanned-aircraft-communications/))

   · Taxonomy evidence: NASA identifies an optical data-communications channel in research intended for unmanned-aircraft applications. The account establishes the named technology category while describing research and flight demonstrations, not commercial drone-link availability. ([nasa.gov](https://www.nasa.gov/aeronautics/quantum-technologies-are-changing-the-face-of-unmanned-aircraft-communications/))

9. 先行先试 多地探索全空间无人体系建设 - 中国发展改革报社, May 19, 2025, Published by NDRC

   · Taxonomy evidence: The dated May xx.xx 2025 newspaper report published by NDRC describes a pilotless passenger-sightseeing demonstration and reports operator-certificate issuance on March xx.xx 2025. This corroborates a dated passenger application only; the exact certificate conditions and attributable drone-link purchases are not established by the article. No research-estimate claims on the page are used. ([ndrc.gov.cn](https://www.ndrc.gov.cn/wsdwhfz/xx.xx/t20250519_1397787_ext.html))

   · Taxonomy evidence: The May xx.xx 2025 official article reports March xx.xx 2025 operating-certificate issuance for pilotless passenger aircraft and describes a passenger-sightseeing demonstration. It establishes the passenger application, not attributable drone-link sales or unrestricted transport authorization. ([ndrc.gov.cn](https://www.ndrc.gov.cn/wsdwhfz/xx.xx/t20250519_1397787_ext.html))

   · Taxonomy evidence: Pilotless passenger carriage is a distinct transport demand setting alongside separately evidenced cargo delivery; the market includes only its identifiable unmanned-aircraft communications portion. ([ndrc.gov.cn](https://www.ndrc.gov.cn/wsdwhfz/xx.xx/t20250519_1397787_ext.html))

10. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026, EASA

    · Taxonomy evidence: The June 2026 compilation includes provisions for externally supplied services and allocation of responsibilities between the UAS operator and service providers. These support a responsibility-based deployment axis but are not a universal global contract classification. ([easa.europa.eu](https://www.easa.europa.eu/en/document-library/easy-access-rules/online-publications/easy-access-rules-unmanned-aircraft-systems?erules-id=ERULES-xx.xx-xx.xx))

    · Taxonomy evidence: The external-services provisions require allocation of roles and responsibilities between the UAS operator and external providers.

    · Taxonomy evidence: Externally provided services necessary to the intended flight are explicitly recognized. This corroborates external service provision without proving that every provider manages the entire communications network. ([easa.europa.eu](https://www.easa.europa.eu/en/document-library/easy-access-rules/online-publications/easy-access-rules-unmanned-aircraft-systems?erules-id=ERULES-xx.xx-xx.xx))

    · Taxonomy evidence: The publication recognizes externally provided services necessary for flight safety and requires their performance to suit the intended operation.

    · Taxonomy evidence: Allocation of operator-provider responsibilities supplies a basis for analyzing shared arrangements; the publication does not establish a named commercial agreement dividing substantive network-management functions. ([easa.europa.eu](https://www.easa.europa.eu/en/document-library/easy-access-rules/online-publications/easy-access-rules-unmanned-aircraft-systems?erules-id=ERULES-xx.xx-xx.xx))

    · Taxonomy evidence: The C2 communications provisions separately address applicable radio-equipment and RF-spectrum requirements.

    · Taxonomy evidence: Unlicensed bands are explicitly recognized as a possible C2-link spectrum setting.

11. OneGov IT - GSA IT Vendor Management Office

- Taxonomy evidence: GSA distinguishes OEM prime-contract relationships from reseller participation and separately discusses professional-service contracts. This is an independent cross-market framework for seller-role classification, not proof of drone-specific channel shares. ([itvmo.gsa.gov](https://itvmo.gsa.gov/onegov/))
- Taxonomy evidence: An OEM can remain the prime supplier while value-added firms perform supporting functions. Supporting intermediary participation therefore does not by itself reclassify the originating supplier's sale as intermediary resale. ([itvmo.gsa.gov](https://itvmo.gsa.gov/onegov/))
- Taxonomy evidence: Integration, engineering, logistics, and compliance are identified value-added roles. Whether a particular drone-link integrator is the intermediary seller, originating supplier, or subcontractor still requires transaction evidence. ([itvmo.gsa.gov](https://itvmo.gsa.gov/onegov/))

12. ISO 21384-3:2026 - Uncrewed aircraft systems - Part 3: Operational procedures

- Taxonomy evidence: ISO distinguishes the C2-link telecommunications service from a tangible product and defines a provider supplying some or all of that service. This supports treating purchased communications provision separately from purchased equipment. ([iso.org](https://www.iso.org/obp/ui?_escaped_fragment_=iso%3Astd%3Aiso%3A21384%3A-xx.xx%3Aed-xx.xx%3Av1%3Aen))
- Taxonomy evidence: The standard defines an external C2-link communications service provider and a service-level agreement between that provider and the UAS operator, establishing a recognized communications-service category. ([iso.org](https://www.iso.org/obp/ui?_escaped_fragment_=iso%3Astd%3Aiso%3A21384%3A-xx.xx%3Aed-xx.xx%3Av1%3Aen))
- Taxonomy evidence: The public definitions identify a C2 communications provider as an entity supplying some or all of the link service and define an enforceable service agreement covering provider obligations.
- Taxonomy evidence: C2 communications providers are included among external services supporting UAS operations.
- Taxonomy evidence: The provider definition permits partial service provision, furnishing a standards basis for separately allocating responsibility; it does not prescribe this taxonomy's hybrid label.

13. SRWG/4 IP/03 - Annex 10 Updates on RPAS C2 Link

- Taxonomy evidence: The ICAO meeting paper's proposed C2-link provisions distinguish communications equipment from communications-service provision and identify aircraft-side and remote-station communications elements. It is used for category terminology, not as proof of a currently applicable legal requirement. ([icao.int](https://www.icao.int/sites/default/files/APAC/Meetings/2020/2020%20SRWG4/xx.xx-Information%20Papers/IP03_ICAO%20AI.xx.xx%xx.xx-%20Annex%2010%20updates%20on%20RPAS%20C2%20Link.pdf))
- Taxonomy evidence: The proposed provisions identify aircraft and remote-pilot-station transceiver elements within the C2-link system, supporting the endpoint-equipment distinction from the overall communications service. ([icao.int](https://www.icao.int/sites/default/files/APAC/Meetings/2020/2020%20SRWG4/xx.xx-Information%20Papers/IP03_ICAO%20AI.xx.xx%xx.xx-%20Annex%2010%20updates%20on%20RPAS%20C2%20Link.pdf))

14. Congressional Record - Senate, February 5, 2024 - India MQ-9B Proposed-Sale Notification

    · Taxonomy evidence: The Congressional Record's MQ-9B proposed-sale notification separately identifies ground data terminals, satellite earth stations, transceivers, and compact data links within the aircraft procurement package. These are recognized communications deliverables; the notification does not establish standalone prices or completed deliveries. ([congress.gov](https://www.congress.gov/xx.xx/crec/2024/xx.xx/xx.xx/xx.xx/xx.xx/CREC-2024-xx.xx-xx.xx-senate.pdf))

    · Taxonomy evidence: The notification describes a compact multiband data link supporting analog waveforms, independently establishing analog signaling within a named UAV communications category. ([congress.gov](https://www.congress.gov/xx.xx/crec/2024/xx.xx/xx.xx/xx.xx/xx.xx/CREC-2024-xx.xx-xx.xx-senate.pdf))

    · Taxonomy evidence: The same named compact data link supports digital waveforms and interoperates with digital tactical communications equipment. Capability does not determine the configuration actually deployed. ([congress.gov](https://www.congress.gov/xx.xx/crec/2024/xx.xx/xx.xx/xx.xx/xx.xx/CREC-2024-xx.xx-xx.xx-senate.pdf))

    · Taxonomy evidence: The proposed procurement includes integration, software support, repair support, and contractor engineering and logistics services alongside communications equipment. The record does not isolate the drone-link share of those broader services. ([congress.gov](https://www.congress.gov/xx.xx/crec/2024/xx.xx/xx.xx/xx.xx/xx.xx/CREC-2024-xx.xx-xx.xx-senate.pdf))

15. SkyLine UAS Command & Control - C2 for BVLOS

    · Taxonomy evidence: The commercial UAS offering distinguishes airborne radios, ground radios, and cloud-based communications software, demonstrating different deliverable forms within one drone-link solution. It does not establish the report's complete offering partition. ([uavionix.com](https://uavionix.com/uncrewed-aircraft-systems/uas-command/))

    · Taxonomy evidence: The offering describes paired airborne and ground radios managed as an integrated communications configuration. This supports complete-system identity, while indivisible package pricing remains unestablished. ([uavionix.com](https://uavionix.com/uncrewed-aircraft-systems/uas-command/))

    · Taxonomy evidence: The page separately identifies airborne and ground radio products and provides a purchase route for a ground radio, supporting separately supplied communications endpoints. ([uavionix.com](https://uavionix.com/uncrewed-aircraft-systems/uas-command/))

    · Taxonomy evidence: SkyLine is described as cloud-based C2 software providing link routing, monitoring, redundancy, and management of airborne and ground radios. Only its communications functions support this category; adjacent fleet-management and airspace-awareness functions remain outside the working boundary. ([uavionix.com](https://uavionix.com/uncrewed-aircraft-systems/uas-command/))

    · Taxonomy evidence: The current commercial page describes drone C2 configurations combining ISM and LTE access and configurations incorporating satellite communications. These are observed combined-access offerings, not authorization records.

    · Taxonomy evidence: The supplier expressly markets its communications ecosystem to support BVLOS deployment requirements. The page does not independently establish flight approval or sales for every configuration.

16. UAV Data Link and Unmanned Communications - DTC

    · Taxonomy evidence: DTC's UAV communications offering explicitly includes technical consultation, integration support, deployment support, and long-term lifecycle support. The page establishes offered service functions, not their separately billed revenue. ([dtccodan.com](https://www.dtccodan.com/solutions/unmanned/))

17. Instructions for the Certificate of Waiver or Authorization - FAA
    - Taxonomy evidence: The FAA's operator application guidance lists Wi-Fi, radio, satellite, Bluetooth, and cellular-network links as C2-link types. This provides independent regulatory recognition of bearer distinctions without defining market shares or an exhaustive commercial taxonomy. ([faa.gov](https://www.faa.gov/uas/advanced_operations/instructions-drone-operators-completing-faa-form-xx.xx-xx.xx))
    - Taxonomy evidence: Wi-Fi, radio, and Bluetooth are explicitly recognized C2-link types, supporting the noncellular-radio grouping when cellular and satellite access are excluded. ([faa.gov](https://www.faa.gov/uas/advanced_operations/instructions-drone-operators-completing-faa-form-xx.xx-xx.xx))
    - Taxonomy evidence: Cellular-network connectivity is explicitly identified as a C2-link type. ([faa.gov](https://www.faa.gov/uas/advanced_operations/instructions-drone-operators-completing-faa-form-xx.xx-xx.xx))
    - Taxonomy evidence: Satellite connectivity is explicitly identified as a C2-link type. ([faa.gov](https://www.faa.gov/uas/advanced_operations/instructions-drone-operators-completing-faa-form-xx.xx-xx.xx))
18. Conducting Extended BVLOS Operations in Challenging Terrain - Public uAvionix Project Report
    - Taxonomy evidence: The FAA-hosted public project report documents integration of cellular, noncellular C-band radio, and satellite communications into a unified UAV C2 link. It establishes a multibearer configuration, not commercial sales or universal performance. ([faa.gov](https://www.faa.gov/uas/programs_partnerships/BAA/BAA004-uAvionix%E2%xx.xx%93Conducting-Extended-BVLOS-Operations-in-challenging-terrain.pdf))
    - Taxonomy evidence: The report separately identifies link-management functionality coordinating the integrated communications links, supporting the distinction between bearer hardware and management software. ([faa.gov](https://www.faa.gov/uas/programs_partnerships/BAA/BAA004-uAvionix%E2%xx.xx%93Conducting-Extended-BVLOS-Operations-in-challenging-terrain.pdf))
19. Utilizing Telecommunications/ICTs for Disaster Risk Reduction and Management - ITU-D Question 5/2
    - Taxonomy evidence: The ITU report identifies tethered UAV equipment communicating with ground equipment through the tether's optical-fiber data path. This independently establishes guided optical communication in an aircraft-external link context. ([itu.int](https://www.itu.int/dms_pub/itu-d/opb/stg/D-STG-SG02.xx.xx-2021-PDF-E.pdf))
20. Safe-T 2 - Advanced Tethering System Brochure
    - Taxonomy evidence: The supplier's Safe-T xx.xx brochure identifies broadband-over-power-line communications within the drone tether offering. This supports an electrical data-bearing tether category rather than treating every tether as optical or power-only. Current configuration continuity across revisions is not established. ([elistair.com](https://elistair.com/wp-content/uploads/2021/xx.xx/Safe-T_2_-_Leaflet.pdf))
    - Taxonomy evidence: The same commercial brochure identifies an optional optical-fiber communications configuration, supporting separate guided-optical and electrical communications categories. ([elistair.com](https://elistair.com/wp-content/uploads/2021/xx.xx/Safe-T_2_-_Leaflet.pdf))
21. Tethered Drone Cables for Commercial & Defense - Gore
    - Taxonomy evidence: Gore markets drone-specific tether cable assemblies for communications and power, distinguishing data-carrying cable components from complete communications terminals or systems. Only directly attributable communications value falls within the working boundary. ([gore.com](https://www.gore.com/products/tethered-drone-cables-commercial-defense))
    - Taxonomy evidence: The commercial drone-cable page distinguishes an electrical data pair from a power pair and an optical-fiber element, supporting electrical data transport as a recognized component function. ([gore.com](https://www.gore.com/products/tethered-drone-cables-commercial-defense))
    - Taxonomy evidence: The page explicitly identifies optical fiber within its drone-tether communications offering. A combined cable does not establish that every available data path is used in a particular purchased configuration. ([gore.com](https://www.gore.com/products/tethered-drone-cables-commercial-defense))

22. HAWK - Optical Communication Terminal for Airborne and Ground Operations

- Taxonomy evidence: Mynaric identifies HAWK as an optical communications terminal with UAS applications, but explicitly describes its status as an early-generation product for demonstrations and use-case verification. The page does not establish unrestricted current drone-market sales. ([mynaric.com](https://mynaric.com/products/hawk))
- Taxonomy evidence: The page distinguishes optical client-data transmission from an additional radio connection required by the described version. Optical classification therefore does not imply the complete absence of ancillary RF connectivity. ([mynaric.com](https://mynaric.com/products/hawk))

23. ETSI TR 102 328 V1.1.1 - Multipoint Equipment and Mesh Topology

- Taxonomy evidence: ETSI identifies a central hub or station in point-to-multipoint networks. This supplies standardized topology terminology; its fixed-radio scope is adapted to UAV networks only alongside UAV-specific evidence. ([etsi.org](https://www.etsi.org/deliver/etsi_tr/102300_102399/xx.xx/xx.xx.01_60/tr_102328v010101p.pdf))
- Taxonomy evidence: ETSI distinguishes multipoint-to-multipoint mesh networks by peer terminal relationships and communications between stations, rather than the radial central-station pattern of point-to-multipoint networks. ([etsi.org](https://www.etsi.org/deliver/etsi_tr/102300_102399/xx.xx/xx.xx.01_60/tr_102328v010101p.pdf))

24. Review of Unmanned Aerial Vehicle Swarm Communication Architectures and Routing Protocols

- Taxonomy evidence: The peer-reviewed review distinguishes centralized UAV communications through a common infrastructure node from decentralized UAV ad hoc communications. Its architecture descriptions support topology definitions, not market penetration or sales. ([mdpi-res.com](https://mdpi-res.com/d_attachment/applsci/applsci-xx.xx-xx.xx/article_deploy/applsci-xx.xx-xx.xx-with-cover.pdf?version=xx.xx))
- Taxonomy evidence: The review describes multiple UAVs communicating through a central infrastructure node and separately identifies star arrangements, supporting the hub-mediated multipoint category. ([mdpi-res.com](https://mdpi-res.com/d_attachment/applsci/applsci-xx.xx-xx.xx/article_deploy/applsci-xx.xx-xx.xx-with-cover.pdf?version=xx.xx))
- Taxonomy evidence: The review identifies ring and mesh intra-UAV communications and peer forwarding, supporting a broader decentralized multipoint category rather than limiting it to one mesh product family. ([mdpi-res.com](https://mdpi-res.com/d_attachment/applsci/applsci-xx.xx-xx.xx/article_deploy/applsci-xx.xx-xx.xx-with-cover.pdf?version=xx.xx))
- Taxonomy evidence: The review describes multi-group UAV networks combining centralized inter-group communication with ad hoc intra-group networks. This supports the identified composite-topology category, but does not establish a commercial contract for it. ([mdpi-res.com](https://mdpi-res.com/d_attachment/applsci/applsci-xx.xx-xx.xx/article_deploy/applsci-xx.xx-xx.xx-with-cover.pdf?version=xx.xx))

25. UAV/UGV Products - Advanced Microwave Products

- Taxonomy evidence: The supplier's UAV/UGV commercial catalog distinguishes communications transmitters, receivers, and transceivers from RF power amplifiers. Only its UAV-attributable offerings support the captured market boundary. ([advmw.com](https://advmw.com/uav-ugv-products/))
- Taxonomy evidence: The catalog markets RF and microwave amplifiers as supporting products for analog and digital transmission sources, establishing a link-support hardware function distinct from the base communications endpoint. ([advmw.com](https://advmw.com/uav-ugv-products/))
- Taxonomy evidence: The catalog explicitly markets analog FM video transmitters and receivers in its unmanned-platform offering. ([advmw.com](https://advmw.com/uav-ugv-products/))
- Taxonomy evidence: The same catalog identifies digital data transceivers for telemetry and control communications, supporting digital noncellular radio as a distinct signaling family. ([advmw.com](https://advmw.com/uav-ugv-products/))

26. Aquila20 FPV Kit - BETAFPV

- Taxonomy evidence: The analog Aquila20 commercial aircraft kit identifies analog video transmission together with ExpressLRS remote-control connectivity. This supports identification of an embedded mixed-signaling configuration; it does not establish a separately priced communications subsystem or bring the whole aircraft into scope. ([betafpv.com](https://betafpv.com/products/aquila20-fpv-kit))

27. Velaris - Satellite Connectivity for UAVs - Viasat
    - Taxonomy evidence: Viasat markets Velaris as a dedicated satellite communications service for UAVs and advanced-air-mobility aircraft. The UAV-attributable communications service supports this offering category without including unrelated aviation or airspace-management services. ([viasat.com](https://www.viasat.com/aviation/advanced-air-mobility/velaris/))
    - Taxonomy evidence: The offering identifies satellite-network delivery of the UAV data link, corroborating satellite RF access as a commercial connectivity family. ([viasat.com](https://www.viasat.com/aviation/advanced-air-mobility/velaris/))
28. Frequently Used Terms - ICAO
    - Taxonomy evidence: ICAO defines the C2 link by its flight-management purpose, supporting a function-based distinction rather than treating all transmitted data as mission payload. ([icao.int](https://www.icao.int/frequently-used-terms))
    - Taxonomy evidence: The C2 definition connects the remotely piloted aircraft and remote pilot station for managing flight. ([icao.int](https://www.icao.int/frequently-used-terms))
    - Taxonomy evidence: ICAO's operator definition includes persons, organizations, and enterprises engaged in aircraft operations, supporting separation of operating customers from equipment-selling intermediaries. ([icao.int](https://www.icao.int/frequently-used-terms))
    - Taxonomy evidence: The international terminology defines VLOS through direct unaided visual contact rather than a radio-range threshold.
    - Taxonomy evidence: The VLOS definition recognizes visual contact maintained by the remote pilot or an RPA observer, supporting a visual-contact category while leaving local deployment conventions to be established.
29. Summary - ITU-T Recommendation F.749.10 (05/2019), Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
    - Taxonomy evidence: The recommendation distinguishes flight-control communication and flight-data transport from mission-payload communication services. ([itu.int](https://www.itu.int/dms_pubrec/itu-t/rec/f/T-REC-F.xx.xx-xx.xx-I%xx.xx%21SUM-HTM-E.htm))
    - Taxonomy evidence: Flight control and flight-data transport are expressly identified communications functions. ([itu.int](https://www.itu.int/dms_pubrec/itu-t/rec/f/T-REC-F.xx.xx-xx.xx-I%xx.xx%21SUM-HTM-E.htm))
    - Taxonomy evidence: Mission-payload services include audio, video, imagery, sensor-data transport, and communication-signal relay. ([itu.int](https://www.itu.int/dms_pubrec/itu-t/rec/f/T-REC-F.xx.xx-xx.xx-I%xx.xx%21SUM-HTM-E.htm))

30. ITU-T Recommendation F.749.10 (05/2019): Requirements for Communication Services of Civilian Unmanned Aerial Vehicles

- Taxonomy evidence: Flight and mission-payload services coexist within the recommendation's communications framework; an indivisible combined-function commercial branch is an analytical allocation, not an official product classification. ([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-F.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items))
- Taxonomy evidence: Appendix I names civilian-UAV communication-service applications across agriculture, inspection, surveillance, disaster monitoring, media, logistics, and research. ([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-F.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items))
- Taxonomy evidence: Police and traffic-security surveillance are named civilian-UAV communications applications. ([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-F.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items))
- Taxonomy evidence: Natural-disaster monitoring is identified as a civilian-UAV communication-service application. ([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-F.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items))
- Taxonomy evidence: Power-line and petroleum-pipeline inspection are explicit communications-service use cases; physical maintenance is not established by this record. ([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-F.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items))
- Taxonomy evidence: Agriculture-related civilian-UAV communication services are explicitly identified. ([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-F.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items))
- Taxonomy evidence: The recommendation recognizes scientific-research data transport and meteorological and territorial-resource applications. ([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-F.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items))
- Taxonomy evidence: Logistics express delivery is a named civilian-UAV communication-service use case. ([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-F.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items))

31. ITU-T Recommendation Y.4215 (02/2022): Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things

- Taxonomy evidence: ITU-T identifies UAS-aided relaying and offloading as applications in which unmanned aircraft act as communications platforms. ([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-Y.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items))
- Taxonomy evidence: The recommendation separately recognizes UAS-aided emergency-response communications, supporting an emergency demand setting without making every emergency relay deployment a distinct topology category. ([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-Y.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items))

32. Drones & Air Mobility Benefits for European Citizens and Air Transport - EASA

· Taxonomy evidence: EASA identifies drone applications including delivery, photography, disaster management, rescue, mapping, inspection, agriculture, and surveillance. ([easa.europa.eu](https://www.easa.europa.eu/en/domains/drones-air-mobility/drones-air-mobility-landscape/benefits))

· Taxonomy evidence: Rescue and firefighting applications explicitly use real-time information and aerial imagery for response decisions. ([easa.europa.eu](https://www.easa.europa.eu/en/domains/drones-air-mobility/drones-air-mobility-landscape/benefits))

· Taxonomy evidence: Geographic mapping is identified as a drone use case. ([easa.europa.eu](https://www.easa.europa.eu/en/domains/drones-air-mobility/drones-air-mobility-landscape/benefits))

· Taxonomy evidence: Photography and filming are described as commercial drone applications; the record does not isolate communications value for entertainment performances. ([easa.europa.eu](https://www.easa.europa.eu/en/domains/drones-air-mobility/drones-air-mobility-landscape/benefits))

· Taxonomy evidence: Law enforcement and rescue services are identified operating settings, supporting civilian public-service customers. ([easa.europa.eu](https://www.easa.europa.eu/en/domains/drones-air-mobility/drones-air-mobility-landscape/benefits))

· Taxonomy evidence: The regulator describes business use in media, agriculture, industrial monitoring, and security. ([easa.europa.eu](https://www.easa.europa.eu/en/domains/drones-air-mobility/drones-air-mobility-landscape/benefits))

33. Drone Integration: Concept of Operations - FAA, May 2025

· Taxonomy evidence: The May 2025 document identifies infrastructure inspection among demonstrated drone applications. ([faa.gov](https://www.faa.gov/uas/resources/policy_library/Drone-Integration-Concept-of-Operations-May-2025.pdf))

· Taxonomy evidence: Aerial surveying is identified as a drone application addressed in the integration framework. ([faa.gov](https://www.faa.gov/uas/resources/policy_library/Drone-Integration-Concept-of-Operations-May-2025.pdf))

· Taxonomy evidence: The document recognizes agricultural assessment and aerial agricultural work, with forestry preservation within its agricultural context. Only these high-level application categories are used. ([faa.gov](https://www.faa.gov/uas/resources/policy_library/Drone-Integration-Concept-of-Operations-May-2025.pdf))

· Taxonomy evidence: Package delivery is a recognized drone application. ([faa.gov](https://www.faa.gov/uas/resources/policy_library/Drone-Integration-Concept-of-Operations-May-2025.pdf))

· Taxonomy evidence: Flight testing and demonstration are identified application settings, not evidence of commercial drone-link revenue. ([faa.gov](https://www.faa.gov/uas/resources/policy_library/Drone-Integration-Concept-of-Operations-May-2025.pdf))

34. U.S. Army UAS Interoperability - July 17, 2026

· Taxonomy evidence: The Army's July xx.xx 2026 publication identifies UAS data links, C2 interfaces, and ISR payload-data dissemination as distinct interoperability disciplines. ([army.mil](https://www.army.mil/article-amp/xx.xx/u_s_army_uas_interoperability))

· Taxonomy evidence: The publication establishes Army demand for unmanned-aircraft communications interfaces and associated ISR information exchange. ([army.mil](https://www.army.mil/article-amp/xx.xx/u_s_army_uas_interoperability))

· Taxonomy evidence: ISR imagery and associated payload information are separately identified from C2 interfaces, corroborating the payload-communications function. ([army.mil](https://www.army.mil/article-amp/xx.xx/u_s_army_uas_interoperability))

35. Protector Enters Service with Royal Air Force - June 16, 2025
    - Taxonomy evidence: The June xx.xx 2025 announcement identifies strike operations among Protector's intended remotely piloted roles, establishing a combat demand setting without isolating communications revenue. ([raf.mod.uk](https://www.raf.mod.uk/news/articles/protector-enters-service-with-royal-air-force/))
    - Taxonomy evidence: The Royal Air Force reports delivered ground-control stations and a remotely piloted aircraft program, directly identifying a defense operating customer. ([raf.mod.uk](https://www.raf.mod.uk/news/articles/protector-enters-service-with-royal-air-force/))
36. Educational Users - FAA, Updated March 13, 2026
    - Taxonomy evidence: The FAA's educational-user publication identifies universities, colleges, technical schools, and educational programs using drones for education and research. ([faa.gov](https://www.faa.gov/uas/educational_users))
    - Taxonomy evidence: Educational users can operate through more than one regulatory pathway; educational purpose therefore does not by itself establish a mutually exclusive institutional buyer sector. ([faa.gov](https://www.faa.gov/uas/educational_users))
37. National Uncrewed Systems Office - U.S. Geological Survey
    - Taxonomy evidence: USGS describes UAS data collection for scientific remote sensing, water-quality research, and environmental restoration, establishing a scientific and environmental demand setting. ([usgs.gov](https://www.usgs.gov/programs/national-land-imaging-program/science/national-uncrewed-systems-office))
    - Taxonomy evidence: The office conducts unmanned-aircraft research and data collection for USGS and Department of the Interior scientists, directly identifying civilian government users. ([usgs.gov](https://www.usgs.gov/programs/national-land-imaging-program/science/national-uncrewed-systems-office))
38. IFRC Drones Group
    - Taxonomy evidence: The IFRC Drones Group identifies National Societies, the Federation Secretariat, and ICRC participants using or developing drone applications for humanitarian programs. This supports an organizational user setting, not separately disclosed link purchases. (drones.preparecenter.org)
    - Taxonomy evidence: The group explicitly addresses aerial assessment and information supporting humanitarian disaster response. (drones.preparecenter.org)
39. Recreational Flyers & Community-Based Organizations - FAA
    - Taxonomy evidence: The FAA distinguishes flying solely for recreation from nonrecreational purposes, supporting recreation as a mission-purpose category rather than a synonym for all unpaid activity. ([faa.gov](https://www.faa.gov/uas/recreational_flyers))
    - Taxonomy evidence: The publication expressly recognizes personal recreational drone flyers; household-consumer classification remains separate from organizational regulatory eligibility. ([faa.gov](https://www.faa.gov/uas/recreational_flyers))
40. FAI Drone Racing World Cup - World Air Sports Federation
    - Taxonomy evidence: FAI identifies its Drone Racing World Cup as an international series of competitive drone-piloting events, independently establishing sport as a distinct mission setting. ([fai.org](https://www.fai.org/event/fai-drone-racing-world-cup))

41. Main Concepts and Definitions of Foreign Direct Investment - OECD Benchmark Definition of Foreign Direct Investment, Fifth Edition, 2025

- Taxonomy evidence: The OECD's 2025 benchmark distinguishes households from independently recognized corporations, nonprofit institutions, and government units, supporting institutional rather than mission-based buyer classification. ([oecd.org](https://www.oecd.org/en/publications/2025/xx.xx/oecd-benchmark-definition-of-foreign-direct-investment-fifth-edition_38a25baf/full-report/main-concepts-and-definitions-of-foreign-direct-investment_c3240e7d.html))
- Taxonomy evidence: Enterprises can be incorporated or unincorporated, and government- or household-owned quasi-corporations can be treated separately from their owners. Business-use classification therefore cannot rely only on public ownership or individual legal identity. ([oecd.org](https://www.oecd.org/en/publications/2025/xx.xx/oecd-benchmark-definition-of-foreign-direct-investment-fifth-edition_38a25baf/full-report/main-concepts-and-definitions-of-foreign-direct-investment_c3240e7d.html))
- Taxonomy evidence: Households are recognized institutional units distinct from legal and social entities; the taxonomy adapts this distinction to personal, nonbusiness drone-link consumption. ([oecd.org](https://www.oecd.org/en/publications/2025/xx.xx/oecd-benchmark-definition-of-foreign-direct-investment-fifth-edition_38a25baf/full-report/main-concepts-and-definitions-of-foreign-direct-investment_c3240e7d.html))

42. Glossary - Government at a Glance 2019, OECD

- Taxonomy evidence: The glossary includes government-controlled nonmarket institutions in general government while excluding public corporations and government-owned quasi-corporations. This supports a control-and-economic-role rule for public institutions. ([oecd.org](https://www.oecd.org/en/publications/government-at-a-glance-2019_8ccf5c38-en/full-report/component-xx.xx.html))
- Taxonomy evidence: Public corporations are distinguished from general government, supporting placement of public commercial enterprises with commercial operating customers rather than automatically with civilian agencies. ([oecd.org](https://www.oecd.org/en/publications/government-at-a-glance-2019_8ccf5c38-en/full-report/component-xx.xx.html))

43. Conceptual Framework - OECD Handbook on the Compilation of Household Distributional Results on Income, Consumption and Saving in Line with National Accounts Totals, 2024

- Taxonomy evidence: The conceptual framework distinguishes corporations, general government, households, and nonprofit institutions serving households as institutional sectors; the drone-buyer partition is an explicit adaptation of these distinctions. ([oecd.org](https://www.oecd.org/en/publications/oecd-handbook-on-the-compilation-of-household-distributional-results-on-income-consumption-and-saving-in-line-with-national-accounts-totals_5a3b9119-en/full-report/component-xx.xx.html))
- Taxonomy evidence: Nonprofit institutions serving households are recognized separately from government, corporations, and households, supporting an independent nonmarket nonprofit buyer branch. ([oecd.org](https://www.oecd.org/en/publications/oecd-handbook-on-the-compilation-of-household-distributional-results-on-income-consumption-and-saving-in-line-with-national-accounts-totals_5a3b9119-en/full-report/component-xx.xx.html))

44. Nigeria Civil Aviation Regulations 2023 - Part 21: Remotely Piloted Aircraft System

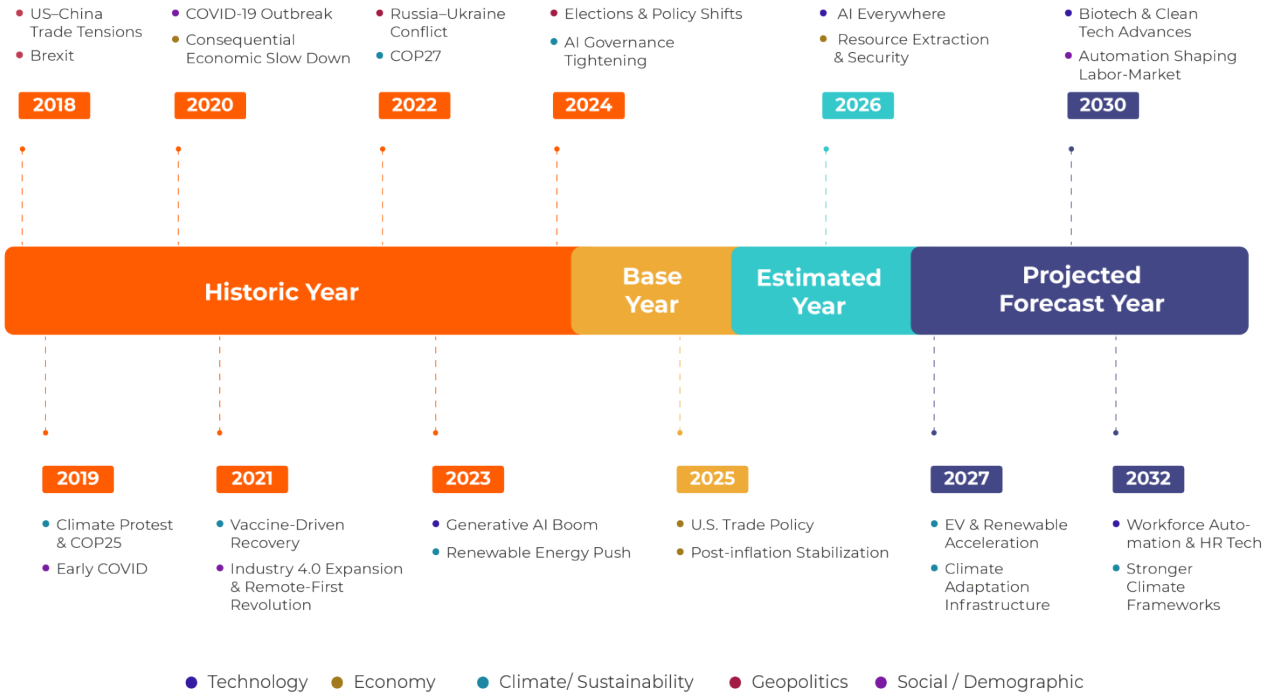
- Taxonomy evidence: Section xx.xx.xx.xx distinguishes full operator control from provider control over part or all of a C2 link, with responsibilities documented through agreements.
- Taxonomy evidence: Entirely operator-controlled C2 links are expressly recognized.
- Taxonomy evidence: The regulation recognizes provider operational control over the entire C2 link.
- Taxonomy evidence: Provider control over only part of a link is also recognized, supporting the category basis without establishing a named shared-management commercial contract.

45. OneGov IT - IT Vendor Management Office
    - Taxonomy evidence: The procurement FAQs distinguish originating manufacturers' prime-contract role from reseller and integrator participation, supplying a cross-market seller-role classification.
    - Taxonomy evidence: An OEM can remain prime contractor while other firms provide supporting functions; subcontractor participation alone does not establish an intermediary sale.
    - Taxonomy evidence: Value-added resellers and integrators provide engineering, integration, logistics, compliance, and mission support. This establishes the intermediary role, not a drone-specific revenue allocation.
46. Doodle Labs announces launch of Reseller Program
    - Taxonomy evidence: The November xx.xx 2023 channel-program announcement expressly addresses UAV-facing communications and names distributors, value-added resellers, and systems integrators.
    - Taxonomy evidence: Distributors are explicitly identified as eligible partners for the supplier's worldwide communications reseller program.
    - Taxonomy evidence: Value-added resellers and systems integrators are explicitly identified as channel partners for UAV-facing communications products; their individual contractual roles require transaction evidence.
47. VERSITRON Introduces NDAA-Compliant Tethered Drone Fiber Optic Converters for Secure Airborne Communications
    - Taxonomy evidence: The June xx.xx 2026 announcement directs purchasers to contact the manufacturer for pricing and product supply, establishing a direct commercial route.
    - Taxonomy evidence: The announced offering supplies a hardwired optical communications path between airborne and ground equipment rather than an RF link.
    - Taxonomy evidence: The manufacturer announced availability of drone-specific fiber-optic converter equipment carrying video and telemetry. This supports a non-radio commercial format as of the announcement, not 2025 sales or universal regulatory clearance.
48. 2. Development of UAS Regulation - ICAO UAS Toolkit
    - Taxonomy evidence: The UAS regulatory guidance distinguishes VLOS-only operating limitations from operations involving BVLOS; the sample regulatory framework is not presented as a universal national law.
    - Taxonomy evidence: VLOS-only operation is explicitly identified as an operating limitation in the sample categorization.
    - Taxonomy evidence: The guidance notes that BVLOS operations can include VLOS launch and recovery, supporting classification of the complete intended deployment rather than overlapping flight-phase peers.
49. Class licences - Australian Communications and Media Authority
    - Taxonomy evidence: Class authorization is contrasted with individually assigned apparatus permission, demonstrating that the global taxonomy must normalize differing legal terminology rather than equate every license with individual authorization.
    - Taxonomy evidence: The page identifies cellular terminals communicating with licensed base stations and satellite terminals communicating with licensed space stations, supporting distinction between terminal permission and underlying network licensing.
    - Taxonomy evidence: Class licenses authorize common equipment on shared frequencies without an individual application or fee, supporting the generally authorized peer.
50. Five-year spectrum outlook 2023-28 - Australian Communications and Media Authority
    - Taxonomy evidence: The 2023-2028 outlook expressly discusses spectrum and licensing arrangements for commercial and consumer drones, establishing a drone-specific regulatory category basis.
    - Taxonomy evidence: The outlook identifies the low-interference-potential-devices class license as supporting drone use cases. This is dated category evidence, not verification of every current deployment's compliance.
51. Radio Regulations: Organization and Main Concepts - ITU Regional Radiocommunication Seminar
    - Taxonomy evidence: The regulatory presentation distinguishes telecommunications using wire, radio, or optical systems and defines radiocommunication specifically through radio waves.
    - Taxonomy evidence: The distinction supplies a conceptual basis for a non-radio permission peer; it does not establish blanket exemption of optical or wired drone links from national safety requirements.

1.4. Years Considered for the Study

The study spans 2024-2032. The historical year is 2024, the base year is 2025, the estimated year is 2026, and the forecast endpoint is 2032. These roles distinguish historical context, the comparison baseline, estimated-year interpretation, and prospective analysis.

Figure 1. Global Drone Data Link System Market, Years Considered for the Study



1.5. Currency Considered for the Study

Monetary market values are expressed in United States dollars (USD) on an absolute-value basis.

1.6. Language Considered for the Study

The study is published in American English. Organization, product, and category names retain their established identities.

1.7. Key Stakeholders

- Drone manufacturers and platform integrators: Decisions concern embedded versus separately supplied link offerings, supplier qualification, interoperability, integration responsibility, and continuity of lifecycle support.
- Data-link hardware and software suppliers: Decisions concern the supported offering perimeter, buyer qualification requirements, defensible differentiation, and whether broader communications capabilities translate into a specific drone-data-link offering.

- Connectivity and lifecycle service providers: Decisions concern provider-managed and hybrid responsibilities, the relationship between connectivity and integration services, and the contractual scope of ongoing support.
- Distributors, retailers, value-added resellers, and integrators: Decisions concern route-to-buyer access, qualification support, integration accountability, and the distinction between channel participation and ownership of an underlying offering.
- Military & Defense Organizations, Civilian Government & Public Institutions, and Nonprofit Institutions: Decisions concern mission-specific qualification, procurement suitability, authorization applicability, and the allocation of network-management and lifecycle responsibilities.
- Commercial Enterprises & Service Operators: Decisions concern the fit between link function and business application, switching obligations, integration into existing operations, and customer-managed versus provider-managed networks.
- Individual & Household Consumers: Decisions concern compatibility, purchasing route, support responsibility, and the distinction between a included data-link offering and the complete aircraft or recreational activity.
- Aviation and spectrum authorities, standards bodies, and industry associations: Their perspectives are relevant to the boundaries of authorization, qualification, interoperability, and institutional access; product availability and deployment eligibility remain separate questions.
- Investors and corporate strategists: Decisions concern whether a supplier's evidenced capabilities, channel access, and delivery obligations support a proposed commercial position within the accepted market rather than an adjacent business.

2. Research Methodology

2.1. Introduction

The study approaches the Global Drone Data Link System market through its included commercial offerings, buyer requirements, and conditions governing access and adoption. It distinguishes classification from verified commercial activity, and observed conditions from conditional interpretations.

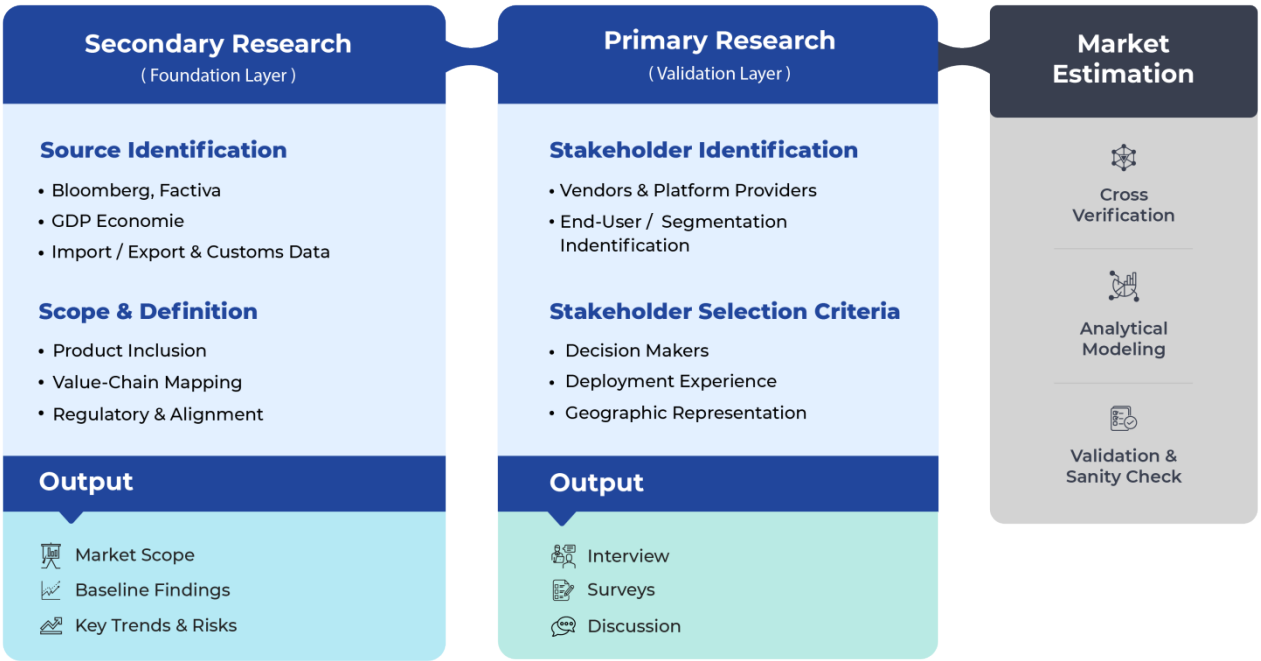
The methodology treats hardware, software, connectivity, and integration or lifecycle services as related but distinct offerings. Analyst-led primary research provides a qualitative challenge layer; numerical conclusions require their own support within the same market boundaries.

2.2. Research Design

The market title and accepted hierarchy establish coverage. Commercial evidence establishes whether a particular offering, supplier role, contractual relationship, or access condition supports a claim within that coverage. This distinction retains all included categories without presuming that every supplier participates in each category or that every application is commercially accessible.

The design separates description of an offering from interpretation of its buyer relevance and from numerical conclusions. Analyst-led primary research challenges market explanations alongside secondary evidence. The expert roster provides professional context rather than a census of suppliers or a substitute for offering-specific support.

Figure 2. Global Drone Data Link System Market, Research Design



2.2.1. Primary Research

The analyst team conducted primary research as a qualitative challenge layer for market definition, segmentation, demand conditions, adoption barriers, and competitive interpretation. This work tested analytical assumptions and sharpened explanations of market mechanisms without serving as standalone support for numerical estimates.

The qualitative challenge layer is evaluated alongside secondary evidence within the accepted market scope. It informs conditional market explanations and hypotheses for subsequent quantitative analysis. Numerical estimates require their own supporting evidence, and a forecast derived from a qualitative assumption does not independently validate that assumption. Final interpretation must reconcile the qualitative findings with the completed quantitative results.

2.2.2. Secondary Research

Secondary evidence anchors publicly verifiable commercial propositions. Where used, supplier materials support the identity and stated status of that supplier's offerings; official records support the scope of an authorization or legal condition; and company filings support disclosed business activity within their stated reporting boundaries. These roles do not make the sources interchangeable.

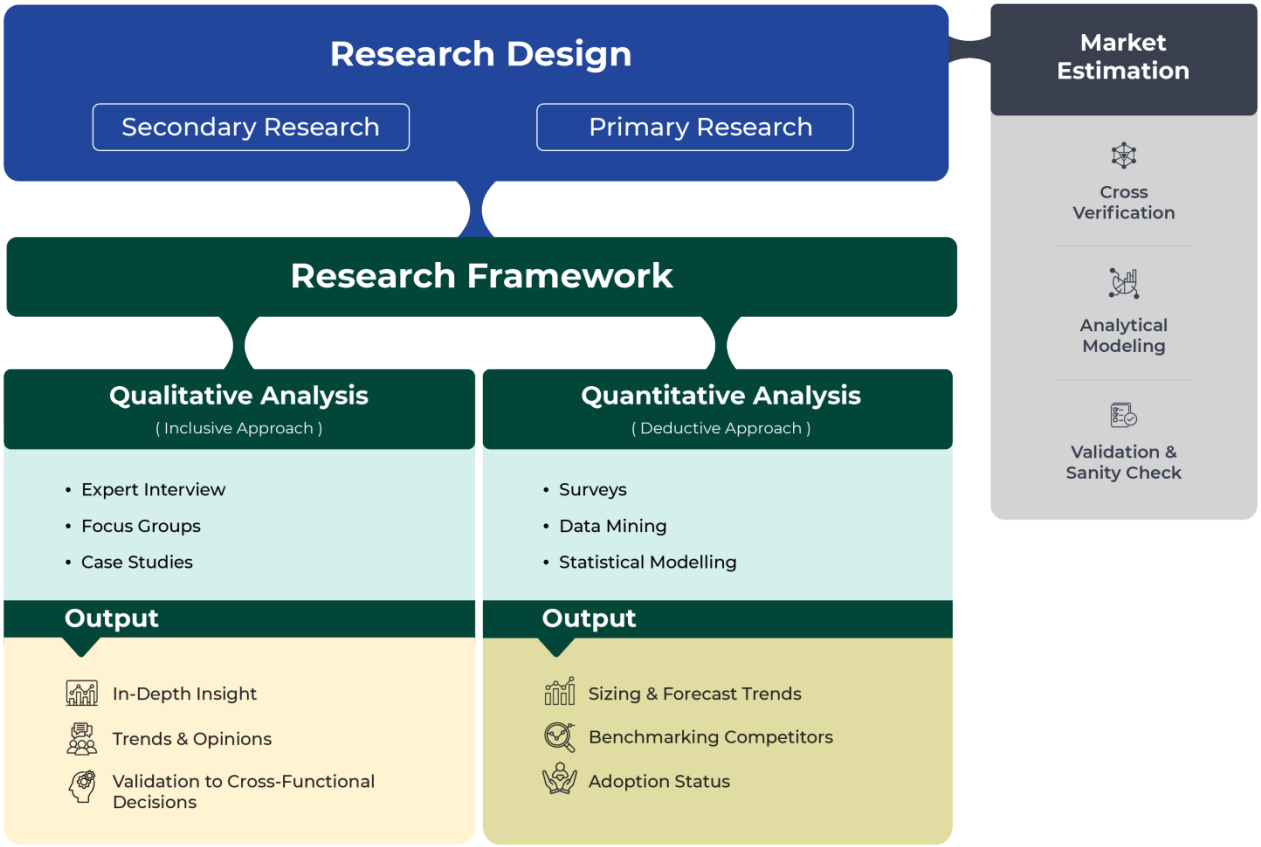
Evidence must relate directly to the relevant drone-data-link offering, buyer context, or access condition. A parent company's broader operations do not establish participation in every included category. Repetition of an underlying announcement does not create independent corroboration, and a source's claim must not be extended beyond its stated scope.

2.3. Research Framework

The framework connects an included offering to its communication technology, topology, link function, mission application, and end user, then examines who manages the network, how the offering reaches the buyer, and which operating and spectrum contexts apply. This structure links product identity to the commercial responsibilities that a purchasing decision must resolve.

Supplier and buyer roles remain distinct from segmentation membership. Competition is evaluated at a comparable offering and buyer-requirement level rather than inferred from a company's presence in the wider drone or telecommunications value chain. Measurement follows the same boundaries so that a commercial interpretation and its supporting figures address the same activity.

Figure 3. Global Drone Data Link System Market, Research Framework



2.3.1. Qualitative Analysis

Qualitative interpretation examines buyer qualification, integration obligations, interoperability, contractual control, switching requirements, and lifecycle responsibility. These variables connect the accepted technology and offering categories to commercial purchasing decisions without treating technical classification as proof of buyer acceptance.

The analyst-led challenge layer tests explanations of demand and access barriers against the accepted market scope. A proposed mechanism must identify the affected buyer or supplier, the relevant commercial constraint, and the conditions under which an alternative becomes practical. Its role is explanatory and conditional, not independent numerical validation.

2.3.2. Quantitative Analysis

Quantitative interpretation requires a consistent offering perimeter, geographic boundary, period role, and definition of the activity being compared. Monetary market values use USD on an absolute-value basis. Broader aircraft, telecommunications, or mission-related business cannot automatically stand for drone-data-link activity.

The segmentation axes describe different attributes of the same market and are not additive market totals. Offering, supplier, contract, and channel identities must be sufficiently clear to detect overlapping descriptions. Numerical support must establish the relevant activity

independently of interview participation, category membership, or qualitative expectations about adoption.

2.4. Market Size Estimation

Market-size interpretation follows the included data-link offerings rather than total aircraft activity, general telecommunications business, or the economic output of a drone mission. Hardware, software, connectivity, and integration or lifecycle services remain in scope, but their inclusion does not establish that associated amounts can be added without examining overlap.

Any numerical conclusion requires support for the relevant drone-data-link activity within a consistent period and geographic perimeter. Embedded functions, multipurpose offerings, and bundled contracts require defensible attribution. Classification identifies what belongs in the study; it does not independently determine that attribution.

2.4.1. Top-Down Approach

For a top-down interpretation, the controlling question is whether a broader aggregate can be related defensibly to the accepted Drone Data Link System perimeter. Aerospace, defense, telecommunications, or drone-operations activity cannot be carried into this market unchanged; the relevant included offerings must be distinguishable from adjacent business.

The aggregate's geographic and period boundaries must also match the intended comparison. A country-specific record, a particular mission application, or a single connectivity category cannot stand for the Global market merely because it falls within the study.

2.4.2. Bottom-Up Approach

A bottom-up interpretation requires evidence tied to identifiable data-link offerings or attributable commercial activity. Supplier participation, product inclusion, and channel presence are distinct propositions; one cannot be substituted for another.

Hardware, software, connectivity, and lifecycle services can represent different included deliverables, while multiple descriptions of the same commercial activity do not establish additional activity. Clear offering identities and overlap checks are therefore prerequisites for aggregation. A supplier list or an aircraft portfolio alone does not establish the studied market perimeter.

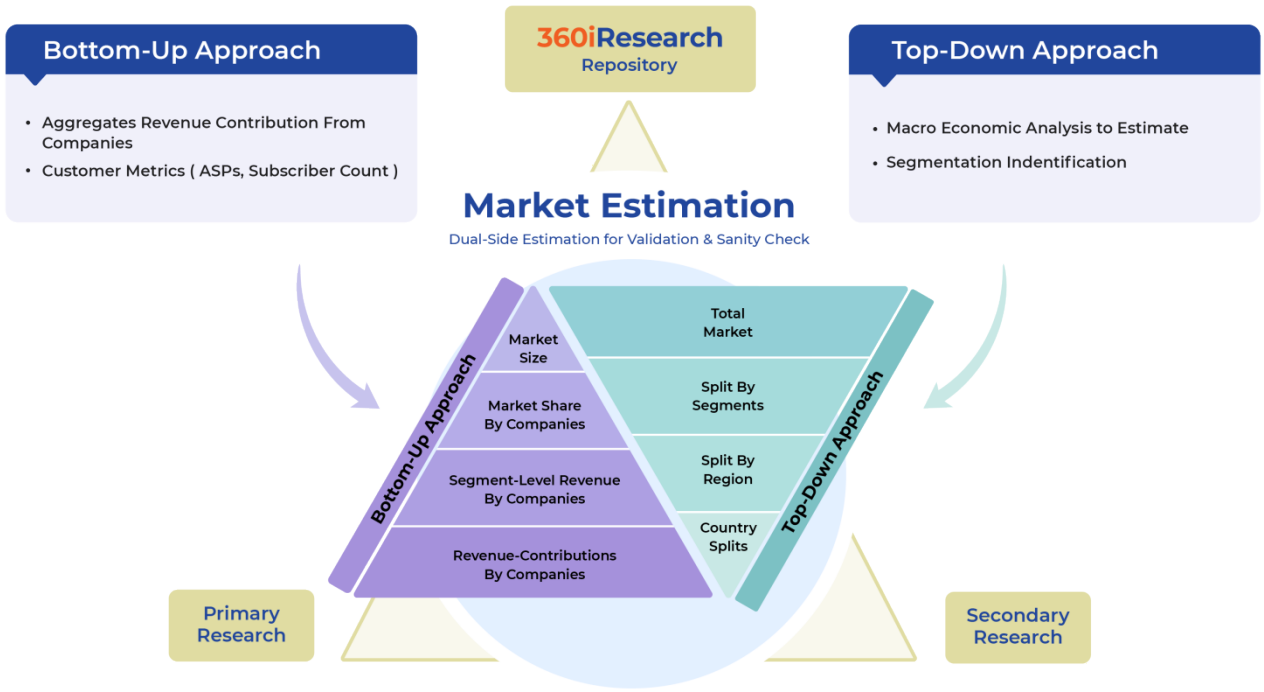
2.5. Data Triangulation

Triangulation addresses whether different evidence paths describe the same commercial proposition. A supplier's offering description, a buyer's procurement scope, and an authorization record may concern different parts of a deployment and cannot automatically corroborate one another.

Differences in definition, period, geography, commercial status, and bundled coverage must be resolved before reconciling claims. Qualitative findings can identify assumptions needing

further examination, but they do not independently validate a numerical estimate or a forecast derived from those assumptions.

Figure 4. Global Drone Data Link System Market, Data Triangulation



2.6. Research Outcomes

The intended decision support is a consistent basis for comparing included offerings, assessing buyer qualification and switching requirements, and distinguishing supplier capability from commercial access. It also supports evaluation of whether sales-channel and deployment-model choices align with buyer responsibilities and the relevant operating context.

Prospective assessments through 2032 should identify the conditions under which a commercial option is feasible, its alternatives and trade-offs, and the evidence needed before commitment. Inclusion in the taxonomy is not itself a recommendation, an authorization, or evidence that procurement will occur.

2.7. Research Assumptions

- Comparisons of embedded or bundled offerings assume that the drone-data-link contribution can be distinguished from unrelated aircraft, network, or mission deliverables. Without defensible attribution, the broader offering cannot be treated entirely as data-link activity.
- The segmentation axes are independent descriptive lenses. An offering may be classified across several axes, but those classifications do not represent separate additive commercial opportunities.

- Commercial interpretation preserves distinctions among marketed, announced, and investigational activity. Category inclusion establishes study coverage, not a supplier's availability, qualification, or deployment authorization.
- Prospective interpretations retain explicit conditions for buyer eligibility, connectivity access, integration, and supplier delivery capability. Evidence concerning an existing offering does not by itself establish future procurement through 2032.

2.8. Research Limitations

- For multipurpose communications products or shared network services, evidence about the wider business may not distinguish drone-data-link activity. Such evidence cannot support a drone-specific comparison without an attributable connection to the included offering.
- Authorization evidence is bounded by its stated jurisdiction, activity, and conditions. A record supporting one operating or spectrum context cannot establish access across the Global market or across every included deployment category.
- Shared technology labels do not establish equivalent qualification, integration, support, or contractual commitments. Supplier substitution decisions require offering-specific evidence rather than category-level similarity.
- Commercial descriptions from manufacturers, integrators, distributors, and service providers can refer to overlapping activity. Conclusions must distinguish separate deliverables from repeated descriptions before comparing or combining them.

3. Executive Summary

3.1. Introduction

The Global Drone Data Link System market is organized around accepted communications responsibilities, not a single interchangeable product class. Embedded and standalone hardware, management software, connectivity, and integration or lifecycle services involve different purchasing counterparties. Included non-radio links also retain mission and aircraft suitability constraints. Remote inspection and public-safety services illustrate why a customer may purchase a connected mission outcome while an operator or aircraft manufacturer purchases the underlying link.

The decisive buyer problem is converting marketed capability into a deployment-ready, supported commitment. Aircraft acceptance, operating permission, communications access and procurement eligibility are separate conditions. The FAA's operation-specific waiver route and the UK's network-consent requirement illustrate why equipment ownership or a managed package cannot settle them all. Supplier comparison should therefore begin with the accepted deliverable and retained duties; portfolio breadth or a familiar connectivity label does not establish a usable alternative.

Sources & Evidence

1. Swisscom Broadcast and Nokia build joint drone network across Switzerland
   · Swisscom's announced inspection and public-safety service combines infrastructure, authorization-application support and data storage, illustrating mission-service purchasing without proving completed nationwide rollout. ([swisscom.ch](https://www.swisscom.ch/en/about/news/2024/xx.xx/xx.xx-drohnennetzwerk-schweiz.html))
2. Part 107 Waivers
   · The FAA provides operation-specific Part xx.xx waivers, including departures from the visual-line-of-sight requirement; equipment procurement does not grant that permission. ([faa.gov](https://www.faa.gov/uas/commercial_operators/part_107_waivers))
3. Statement: Spectrum for Unmanned Aircraft Systems (UAS)
   · Ofcom requires network-operator agreement for covered mobile and satellite use, separately from aviation requirements. ([ofcom.org.uk](https://www.ofcom.org.uk/spectrum/radio-equipment/spectrum-for-unmanned-aircraft-systems))
4. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
   · DIU distinguishes interoperable components and software from complete aircraft, and verification selections from completed additions. ([diu.mil](https://www.diu.mil/latest/blue-uas-refresh-list-and-framework-platforms-and-capabilities-selected))
5. Datalinks | UAV Navigation
   · UAV Navigation identifies Microhard modems within TELEM07 packages, illustrating distinct originating-component and configured-package roles. ([uavnavigation.com](https://uavnavigation.com/products/peripherals/datalinks))
6. SkyLink - uAvionix
   · SkyLink requires SkyLine network-management integration for full functionality, illustrating linked equipment and management deliverables. ([uavionix.com](https://uavionix.com/product/skylink/))
7. Support - Elistair | Tethered Drone Company
   · Elistair states that tethered data transfer depends on the aircraft and may remain wireless despite tether compatibility. ([elistair.com](https://elistair.com/client-support/))

3.2. CXO Perspective

Aircraft OEMs and component entrants should choose an integration route only when its compatibility-defined package matches the aircraft program and the seller accepts delivery, replacement-support and upstream escalation duties. Direct component supply preserves sourcing control when the OEM can retain those responsibilities. Government-facing commitments additionally require the actual offering's verified status and solicitation fit, not qualification inferred from a partner or another product.

Enterprise CFOs should approve equipment and continuing software, connectivity and support obligations against the same authorized mission. Managed delivery is justified by responsibilities actually transferred, not ownership form alone. Quote exclusions and renewal terms can leave consequential duties with the buyer; internally capable operators may prefer direct relationships despite retaining more coordination work.

Procurement leaders seeking resilience should distinguish seller diversity from originating-source independence. TELEM07, UXV and Triad packages incorporate named originating radios, so another seller quotation may preserve upstream exposure. An accepted alternative source is the relevant diversification trigger. Installed buyers should also confirm continuing entitlements and authorization conformity before crediting equipment retention or replacement flexibility.

Sources & Evidence

1. Galaxy 1 partners with Viasat to deliver rapid, scalable and secure communications for uncrewed aircraft
   · The Galaxy xx.xx collaboration describes provisioning, billing, integration and lifecycle coordination; customer-specific duty transfer remains a contractual question. ([viasat.com](https://www.viasat.com/news/latest-news/aviation/2026/galaxy-xx.xx-partners-with-viasat/))
2. Nokia extends partner program to accelerate Drones-as-a-Service business in North America
   · Nokia's acquisition alternatives and bundled services support comparing ownership and retained responsibilities; promotional returns claims are not treated as realized outcomes. ([nokia.com](https://www.nokia.com/newsroom/nokia-extends-partner-program-to-accelerate-drones-as-a-service-business-in-north-america/))
3. Part 107 Waivers
   · Operation-specific waivers support evaluating equipment and service commitments against the same authorized mission. ([faa.gov](https://www.faa.gov/uas/commercial_operators/part_107_waivers))
4. Drones (UAS)
   · EASA requires specific-category aircraft to comply with their operational authorization, constraining assumptions about retained equipment or replacement flexibility. ([easa.europa.eu](https://www.easa.europa.eu/en/the-agency/faqs/drones-uas))
5. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
   · The Framework provides component-level procurement options; the announcement differentiates pending verification and completed additions rather than conferring portfolio-wide status. ([diu.mil](https://www.diu.mil/latest/blue-uas-refresh-list-and-framework-platforms-and-capabilities-selected))
6. Read our Terms & Conditions
   · Elsight's terms specify cloud renewal, purchased-period support, nontransferable embedded-software rights and exclusions for unlisted connections and third-party integration. ([elsight.com](https://www.elsight.com/terms-conditions/))
7. Triad High Power Radio Systems For Unmanned Land Air Sea
   · Triad identifies originating Microhard, Silvus, DTC and Mobilicom radios within configured offerings, supporting seller-versus-source diligence. ([triadrf.com](https://triadrf.com/radio-systems/))

8. Datalinks | UAV Navigation
   · TELEM07 carries a stated UAV Navigation autopilot-compatibility proposition and incorporates Microhard modems, supporting package-boundary and upstream-dependency assessments. ([uavnavigation.com](https://uavnavigation.com/products/peripherals/datalinks))
9. Unleashing the Power of Swappable Radio Modules (SRM): The Future of Connectivity Is Here.
   · UXV names Persistent Systems, Silvus, Doodle Labs, Microhard and TrellisWare within its SRM integration ecosystem, distinguishing package choice from originating supply. ([uxvtechnologies.com](https://www.uxvtechnologies.com/news/unleashing-the-power-of-swappable-radio-modules-srm-the-future-of-connectivity-is-here))

3.3. New Revenue Opportunities

Conditional revenue routes include accepted communications supply to aircraft OEMs, contracted connectivity coordination for authorized operators, and equipment-specific support or migration for installed fleets. Tether-compatible missions provide an additional bounded route for verified data-bearing offerings. Commercial accessibility depends on an accountable qualified buyer, usable access and an accepted delivery scope rather than the application label alone. The Opportunity Mapping section assesses these routes and their capture conditions; none establishes an unconditional Global rollout opportunity.

Sources & Evidence

1. Galaxy 1 partners with Viasat to deliver rapid, scalable and secure communications for uncrewed aircraft
   · The announced Velaris coordination layer supports an assessed managed-connectivity route beyond terminal resale, not customer-specific service guarantees. ([viasat.com](https://www.viasat.com/news/latest-news/aviation/2026/galaxy-xx.xx-partners-with-viasat/))
2. Drones (UAS)
   · Authorized aircraft requirements remain relevant to equipment-specific continuity and migration opportunities. ([easa.europa.eu](https://www.easa.europa.eu/en/the-agency/faqs/drones-uas))
3. Statement: Spectrum for Unmanned Aircraft Systems (UAS)
   · The UK framework retains separate network consent, limiting unconditional managed-connectivity opportunity claims. ([ofcom.org.uk](https://www.ofcom.org.uk/spectrum/radio-equipment/spectrum-for-unmanned-aircraft-systems))
4. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
   · Component consideration is an identifiable government-facing route, while actual offering status must remain distinct from selection for verification. ([diu.mil](https://www.diu.mil/latest/blue-uas-refresh-list-and-framework-platforms-and-capabilities-selected))
5. StreamCare+ - Silvus Technologies
   · Silvus markets StreamCare+ support with differing coverage options, establishing a lifecycle purchasing route without settling individual equipment coverage. ([silvustechnologies.com](https://silvustechnologies.com/resources/streamcare-plus/))
6. Datalinks | UAV Navigation
   · The named compatibility-defined TELEM07 offering establishes a component-package purchasing route, not equivalent obligations for a separately purchased modem. ([uavnavigation.com](https://uavnavigation.com/products/peripherals/datalinks))
7. Support - Elistair | Tethered Drone Company
   · Aircraft-dependent tethered data availability and named maintenance arrangements support a bounded, offering-specific continuity and tethered-supply assessment. ([elistair.com](https://elistair.com/client-support/))

3.4. Next-Generation Business Models

Publicly offered models extend beyond one-time hardware ownership. Nokia's North American partner program describes purchase, lease and flight-hire arrangements with bundled services, while the Galaxy xx.xx-Viasat collaboration adds managed distribution to Velaris. These are documented commercial alternatives, not evidence of widespread adoption or superior realized returns.

Ownership, management entitlement and service responsibility remain separate commercial choices even within a bundle. Elsight's cloud-renewal provisions and quote exclusions illustrate continuing obligations; SkyLink's dependence on SkyLine illustrates management access consequential to hardware functionality. Proposals should identify equipment, software rights, connectivity and support separately. Partner-led delivery remains conditional on usable access and explicit operator, data and escalation responsibilities rather than presumed transfer of every obligation.

Sources & Evidence

1. Galaxy 1 partners with Viasat to deliver rapid, scalable and secure communications for uncrewed aircraft
   · The March xx.xx 2026 collaboration adds Galaxy xx.xx's managed distribution role to Viasat's Velaris satellite-service proposition. ([viasat.com](https://www.viasat.com/news/latest-news/aviation/2026/galaxy-xx.xx-partners-with-viasat/))
2. Nokia extends partner program to accelerate Drones-as-a-Service business in North America
   · Nokia's North American partner program describes purchase, lease, sharing and flight-hire alternatives with bundled maintenance, analytics and scheduling. ([nokia.com](https://www.nokia.com/newsroom/nokia-extends-partner-program-to-accelerate-drones-as-a-service-business-in-north-america/))
3. Drones (UAS)
   · EASA retains operator duties concerning authorization limitations, security, privacy and records, supporting explicit responsibilities in partner-led packages. ([easa.europa.eu](https://www.easa.europa.eu/en/the-agency/faqs/drones-uas))
4. Statement: Spectrum for Unmanned Aircraft Systems (UAS)
   · A managed delivery relationship does not independently grant the network or aviation permissions retained by the UK framework. ([ofcom.org.uk](https://www.ofcom.org.uk/spectrum/radio-equipment/spectrum-for-unmanned-aircraft-systems))
5. Read our Terms & Conditions
   · Cloud renewal and quote-defined connection and support entitlements remain distinct from hardware ownership. ([elsight.com](https://www.elsight.com/terms-conditions/))
6. SkyLink - uAvionix
   · The stated SkyLine dependency makes management access commercially consequential to the SkyLink hardware purchase. ([uavionix.com](https://uavionix.com/product/skylink/))

3.5. Industry Roadmap

For 2026-2027, priorities are permission-backed orders and offering-specific eligibility. Canada's qualifying lower-risk BVLOS pathway, effective November xx.xx 2025, provides an existing route; the September xx.xx 2026 TSA notice described the broader U.S. framework as proposed. The FCC component rule is scheduled to take effect October xx.xx 2026, followed by role-specific marketplace FCC-ID display deadlines of March xx.xx and June xx.xx 2027. Its

prospective component prohibition does not revoke previously authorized equipment, supporting targeted diligence rather than blanket replacement.

For 2028-2029, the assessed scenario centers on management renewal, covered support and accepted alternatives to shared originating suppliers. For 2030-2032, recognized aviation-service relationships and destination-specific responsibility schedules could become more consequential to procurement. FAA UTM service evaluation and EASA cross-border requirements provide institutional foundations, not a completed Global permission framework. Renewal rights, accepted independent sources, recognized service relationships and executed local agreements are commercial decision triggers. These horizons are conditional scenarios, not promised adoption milestones.

Sources & Evidence

1. Part 107 Waivers
   · The existing waiver pathway supports permission-backed purchasing separately from commitments dependent on another regulatory framework. ([faa.gov](https://www.faa.gov/uas/commercial_operators/part_107_waivers))
2. Drones (UAS)
   · Relevant specific-category cross-border operations retain destination confirmation and local conditions; standard-scenario and LUC routes provide defined simplifications. ([easa.europa.eu](https://www.easa.europa.eu/en/the-agency/faqs/drones-uas))
3. Unmanned Aircraft System Traffic Management (UTM)
   · FAA UTM work includes service recognition and interoperability; NTAP evaluates services rather than certifying them and requires aligned operator and provider participation. ([faa.gov](https://www.faa.gov/uas/advanced_operations/traffic_management))
4. Notice Soliciting Representatives for Technical Roundtables on Security of Unmanned Aircraft Systems Operating Beyond the Visual Line of Sight
   · The September xx.xx 2026 TSA notice describes the joint BVLOS framework as proposed and regulatory requirements as being finalized. ([federalregister.gov](https://www.federalregister.gov/documents/2026/xx.xx/xx.xx/2026-xx.xx/notice-soliciting-representatives-for-technical-roundtables-on-security-of-unmanned-aircraft-systems))
5. Protecting Against National Security Threats to the Communications Supply Chain Through the Equipment Authorization Program
   · The FCC final rule is effective October xx.xx 2026. Its specified logic-bearing component prohibition applies prospectively and does not affect previously authorized equipment. ([federalregister.gov](https://www.federalregister.gov/documents/2026/xx.xx/xx.xx/2026-xx.xx/protecting-against-national-security-threats-to-the-communications-supply-chain-through-the))
   · FCC-ID display compliance dates are March xx.xx 2027 for applicable marketplaces with physical access or title, and June xx.xx 2027 for applicable marketplaces relying on third-party seller certifications, subject to defined exceptions. ([federalregister.gov](https://www.federalregister.gov/documents/2026/xx.xx/xx.xx/2026-xx.xx/protecting-against-national-security-threats-to-the-communications-supply-chain-through-the))
6. 2025 Summary of changes to Canada's drone regulations
   · Canada's rules effective November xx.xx 2025 permit qualifying lower-risk BVLOS operations without an SFOC-RPAS, subject to pilot and operator certification and operating conditions. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
7. Triad High Power Radio Systems For Unmanned Land Air Sea
   · Triad's named incorporated radios corroborate shared upstream dependencies relevant to an accepted-alternative sourcing scenario. ([triadrf.com](https://triadrf.com/radio-systems/))

8. StreamCare+ - Silvus Technologies
   · The support program grounds the conditional repeat-procurement focus on covered equipment and continuing support, not assured customer retention. ([silvustechnologies.com](https://silvustechnologies.com/resources/streamcare-plus/))
9. SkyLink - uAvionix
   · SkyLink's management dependency supports a conditional continuity-and-renewal scenario, not a forecast of customer retention. ([uavionix.com](https://uavionix.com/product/skylink/))
10. Unleashing the Power of Swappable Radio Modules (SRM): The Future of Connectivity Is Here.
    · Named incorporated radio suppliers ground the conditional sourcing scenario; another configured seller need not provide independent originating supply. ([uxvtechnologies.com](https://www.uxvtechnologies.com/news/unleashing-the-power-of-swappable-radio-modules-srm-the-future-of-connectivity-is-here))

4. Market Overview

4.1. Introduction

The Global Drone Data Link System market combines embedded communications components, separately purchased link equipment, management software and connectivity services. ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ These offerings participate at different points in the purchase and support relationship; their presence does not establish interchangeability or market leadership.

▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ Elistair's optical-fiber tether option illustrates a separately identifiable non-radio communications role. Wider aircraft, mission-service and telecommunications packages are adjacent commercial systems whose included data-link contributions must remain distinguishable.

Commercial availability and deployment permission are separate conditions. ▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ Consequently, marketed equipment is evidence of an offering, not proof that every buyer can deploy it in every included jurisdiction or mission.

Figure 5. Global Drone Data Link System Market Size, 2017-2032

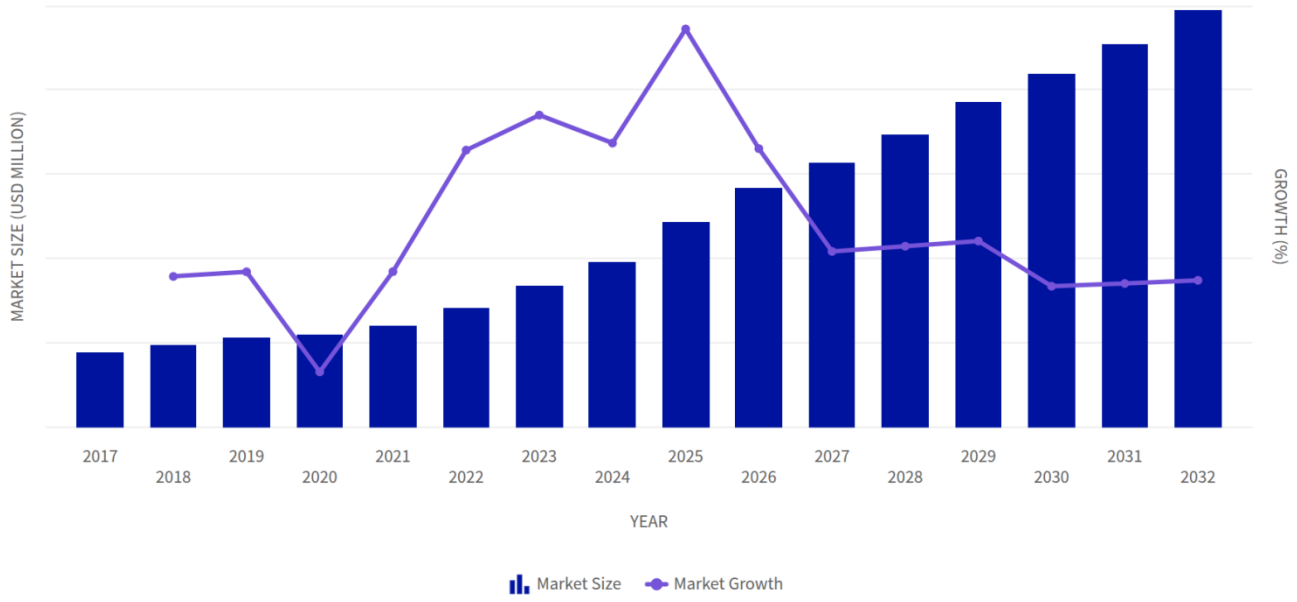


Table 2. Global Drone Data Link System Market Size, 2017-2032 (USD Million)

World	2023	2024	2025	2026	2027	2032	CAGR (%)
Global	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. New Doodle Labs Mesh Rider Radio offerings expand band flexibility and ease of integration
   · Doodle Labs published OEM-form Mesh Rider Radio offerings, supporting the distinction between embedded components and services. ([doodlelabs.com](https://doodlelabs.com/blog/new-offerings-expand-flexibility-integration))
2. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
   · Elsight markets Halo as a multibearer communications offering with management capabilities and an OEM format. ([elsight.com](https://www.elsight.com/products/halo-for-commercial-use/))
3. Velaris - BVLOS connectivity for UAVs
   · Viasat markets Velaris as a dedicated satellite communications service for UAVs and Advanced Air Mobility aircraft. ([viasat.com](https://www.viasat.com/aviation/advanced-air-mobility/velaris/))
4. Safe-T Drone Power Station
   · Elistair offers Safe-T xx.xx with an optical-fiber option, supporting an identifiable non-radio communications role. ([elistair.com](https://elistair.com/solutions/tethering-station-safe-t/))
5. Part 107 Waivers
   · The FAA identifies a Part xx.xx waiver route for beyond-visual-line-of-sight operations, separate from equipment availability. ([faa.gov](https://www.faa.gov/uas/commercial_operators/part_107_waivers))
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
   · Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
6. Operational Authorisation
   · EASA's specific-category authorizations define operating conditions, with exceptions for standard scenarios and appropriate LUC privileges. ([easa.europa.eu](https://www.easa.europa.eu/en/domains/drones-air-mobility/operating-drone/specific-category-civil-drones/operational-authorisation))
7. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
8. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.

9. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
10. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
11. Telemetry Radios - Holybro Store
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
12. Motorola Solutions - March 2, 2026 Conference Transcript
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
13. Codan FY2025 Results - ASX Announcement, August 21, 2025
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
14. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
15. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
16. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
17. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

18. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
· Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
19. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
· Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
20. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
· Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
21. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
· Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
22. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
· Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
23. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
· Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

4.2. Key Growth Contribution

Remote inspection and public-safety services create a communications purchase trigger when a customer requires remotely delivered mission information rather than only an aircraft. Swisscom's announced service illustrates the combination of infrastructure, application support and storage behind that requirement. Serving it requires an identifiable link contribution, continuing service coordination and clear acceptance responsibilities. Adoption remains bounded by the operator's applicable permission and usable connectivity; the FAA's waiver pathway illustrates why marketed remote-operation capability cannot itself convert every prospective mission into a deployable service.

Figure 6. Global Drone Data Link System Market, Key Growth contribution, 2025-2032

Table 3. Global Drone Data Link System Market, Key Growth Contribution, 2025-2032

Scope	Leading category	Added value (USD Million)	Growth share (%)	CAGR (%)
Global - Connectivity Technology	xx.xx	xx.xx	xx.xx	xx.xx
Global - Country	xx.xx	xx.xx	xx.xx	xx.xx
Global - Deployment Model	xx.xx	xx.xx	xx.xx	xx.xx
Global - End User	xx.xx	xx.xx	xx.xx	xx.xx
Global - Link Function	xx.xx	xx.xx	xx.xx	xx.xx
Global - Mission Application	xx.xx	xx.xx	xx.xx	xx.xx
Global - Network Topology	xx.xx	xx.xx	xx.xx	xx.xx
Global - Offering	xx.xx	xx.xx	xx.xx	xx.xx
Global - Operating Envelope	xx.xx	xx.xx	xx.xx	xx.xx
Global - Region	xx.xx	xx.xx	xx.xx	xx.xx
Global - Sales Channel	xx.xx	xx.xx	xx.xx	xx.xx
Global - Spectrum Access	xx.xx	xx.xx	xx.xx	xx.xx

Sources & Evidence

1. Swisscom Broadcast and Nokia build joint drone network across Switzerland

   · Swisscom's announced inspection and public-safety service combines infrastructure, authorization-application support and data storage; it does not establish completed nationwide deployment. ([swisscom.ch](https://www.swisscom.ch/en/about/news/2024/xx.xx/xx.xx-drohnennetzwerk-schweiz.html))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.

2. Part 107 Waivers

   · The FAA identifies applicable departures from Part xx.xx's visual-line-of-sight requirement as requiring a waiver, independently of communications availability. ([faa.gov](https://www.faa.gov/uas/commercial_operators/part_107_waivers))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.

3. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China

   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
   ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
   ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.

4. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility

   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares.
   ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares.
   ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

5. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
6. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
7. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.

8. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
9. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.

10. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
11. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.

12. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
13. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

14. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
15. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
16. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

17. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
18. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

19. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
20. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
21. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
22. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
23. 2025 Summary of Changes to Canada’s Drone Regulations - Transport Canada
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.

24. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
25. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
26. Transformation of the Defence Forces: How Ukraine Changed Its System - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
27. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.

28. Safe-T Drone Power Station - Elistair
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
29. Safe-T 2 - Advanced Tethering System Brochure
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
30. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.

31. UAV Data Link and Unmanned Communications - DTC, a Codan Company
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
32. Summary - ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
33. Mynaric AG - Annual Report 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
34. General Atomics and Kepler Communications Successfully Demonstrate Air-to-Space Optical Communications Capability
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.

35. Doodle Labs Announces Launch of Reseller Program
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
36. Where To Buy - DJI
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
37. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 announcement assigns provisioning, billing and integration responsibilities, supporting a managed value-added channel mechanism without measured penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced delivery relationship concerns a dedicated satellite communications service; it supports a forecast premise, not realized 2032 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March 2026 collaboration names provisioning, billing, monitoring and lifecycle duties, supporting a provider-management commercial premise without disclosing penetration.
38. Statement: Spectrum for Unmanned Aircraft Systems - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An intermediary cannot independently grant network permission, limiting the forecast transfer of customer obligations.

39. DJI O4 Air Unit Series - FAQ

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.

40. Read Our Terms & Conditions - Elsight

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.

41. Uncrewed Aircraft Systems - NIST Public Safety Communications Research

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.

42. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
43. DJI Agriculture Reveals Global Adoption of Agricultural Drones Cuts 51Mt in Carbon Emissions and Saves 410Mts of Water for Farmers Globally
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
44. DJI Agriculture's Annual Report Reveals Drone-Powered Farming Revolution at Brazil's Agrishow 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
45. EHang Reports Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results - SEC Exhibit 99.1
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.

46. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
47. UAS Operator Radio Licence Guidance - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
48. Class Licences - Australian Communications and Media Authority
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
49. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.

50. Defence Procurement Agency DOT - Official Post on Fiber-Optic Drone Procurement and 2025 Deliveries
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
51. ITU-T Y.4215 - Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
52. IFRC Drones Group
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
53. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.

4.3. Industry Ecosystem & Value Chain Analysis

[illegible] Value capture can therefore occur through equipment supply, software access, connectivity and continuing service responsibilities. These deliverables can be bundled, but a package does not make each intermediary's description a separate underlying data-link activity.

Provisioning and service coordination are identifiable commercial control points. [illegible] Its commercial value depends on the responsibilities actually transferred and the customer's remaining approvals, not merely on the existence of a partner relationship.

[redacted] Buyers should distinguish the equipment seller, network counterparty and incident-resolution owner before accepting an end-to-end commitment. A direct purchase provides more control over those relationships, while an integrated service can simplify coordination at the cost of dependence on its delivery contract.

Sources & Evidence

1. Galaxy 1 partners with Viasat to deliver rapid, scalable and secure communications for uncrewed aircraft
   · The March xx.xx 2026 announcement describes Galaxy xx.xx's Velaris delivery role in provisioning, billing, compliance oversight and integration.
   ([viasat.com](https://www.viasat.com/news/latest-news/aviation/2026/galaxy-xx.xx-partners-with-viasat/))
2. Statement: Spectrum for Unmanned Aircraft Systems (UAS)
   · Ofcom's UAS framework requires relevant network-operator agreement for covered mobile and satellite use.
   ([ofcom.org.uk](https://www.ofcom.org.uk/spectrum/radio-equipment/spectrum-for-unmanned-aircraft-systems))

4.3.1. Supply-Side Analysis

Suppliers differ in the commercial responsibility they accept. [redacted] An aircraft manufacturer must qualify the applicable offering and supply commitment rather than shortlist on a technology label alone.

Government screening adds another supply-side filter. [redacted] This supports a component-level route to consideration, but suppliers still need to establish the exact procurement's requirements and their ability to fulfill and support an order.

[redacted] Buyers should establish which entity provides warranty, maintenance and contractual support following such transactions. The completed acquisition does not by itself establish completed product integration, superior delivery or market-wide concentration.

Sources & Evidence

1. New Doodle Labs Mesh Rider Radio offerings expand band flexibility and ease of integration
   · The published OEM portfolio includes licensed and unlicensed combinations; catalog availability does not establish destination authorization.
   ([doodlelabs.com](https://doodlelabs.com/blog/new-offerings-expand-flexibility-integration))
2. Motorola Solutions, Inc. Form 8-K reporting completion of the Silvus acquisition
   · Motorola Solutions' mandatory filing establishes completion of its Silvus acquisition on August xx.xx 2025.
   ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/d88358d8k.htm))

3. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
   - DIU distinguishes interoperable components and software from complete platforms and distinguishes verification candidates from completed additions. ([diu.mil](https://www.diu.mil/latest/blue-uas-refresh-list-and-framework-platforms-and-capabilities-selected))

4.3.2. Demand-Side Analysis

Demand originates in the mission, but the link buyer may be an aircraft manufacturer, integrator or service operator rather than the ultimate user. Swisscom's announced inspection, police and site-protection services illustrate customers purchasing a mission service instead of assembling a communications supply chain. [illegible]

[illegible] A buyer therefore cannot assume that access obtained for the flight-management function also covers mission-payload traffic. Procurement should identify the included functions and applicable access conditions before treating an integrated offering as a complete solution.

Ownership preferences change the demand presented to suppliers. [illegible] The choice should follow the approved mission schedule, internal management capability and contract scope, not a presumption that service procurement is always preferable.

Sources & Evidence

1. Swisscom Broadcast and Nokia build joint drone network across Switzerland
   - Swisscom announced a one-stop drone-service infrastructure for inspections, police deployments and site protection, including applications and data storage. ([swisscom.ch](https://www.swisscom.ch/en/about/news/2024/xx.xx/xx.xx-drohnennetzwerk-schweiz.html))
2. Nokia extends partner program to accelerate Drones-as-a-Service business in North America
   - Nokia describes purchase, lease, sharing and flight-hire arrangements with bundled maintenance and other services. ([nokia.com](https://www.nokia.com/newsroom/nokia-extends-partner-program-to-accelerate-drones-as-a-service-business-in-north-america/))
3. Spectrum Rules and Policies for the Operation of Unmanned Aircraft Systems
   - The FCC limits non-networked access communications in its dedicated UAS band to control and non-payload communications. ([federalregister.gov](https://www.federalregister.gov/documents/2025/xx.xx/xx.xx/2024-xx.xx/spectrum-rules-and-policies-for-the-operation-of-unmanned-aircraft-systems))

4.3.3. Stakeholder Analysis

[illegible] Ofcom explicitly

separates its UAS radio authorization from aviation requirements. This division means that a buyer needs an approval and responsibility map rather than a single generalized claim that the link is compliant.

Aircraft manufacturers and integrators influence the accepted configuration and supporting documentation, while the operator retains duties associated with the authorized operation. ■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ Contracts should consequently identify the contributions of the aircraft supplier, link vendor, connectivity provider and managed-service provider without assuming that outsourcing removes the operator's regulatory responsibilities.

Mission customers and affected communities introduce data-governance exposure distinct from flight permission. ■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■ ■■■ ■■■■■■ ■■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■ ■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ Provider-managed delivery can consolidate administration, but the allocation of legal and contractual responsibilities remains consequential.

Sources & Evidence

1. Drones (UAS)
   · EASA identifies operator responsibilities for authorization compliance, security and operational records. ([easa.europa.eu](https://www.easa.europa.eu/en/the-agency/faqs/drones-uas))
2. Statement: Spectrum for Unmanned Aircraft Systems (UAS)
   · Ofcom separates radio authorization from aviation requirements, supporting the division of stakeholder authority. ([ofcom.org.uk](https://www.ofcom.org.uk/spectrum/radio-equipment/spectrum-for-unmanned-aircraft-systems))
3. Privacy by Design
   · EASA identifies operator data-protection responsibilities and geographic restrictions that may arise for privacy reasons. ([easa.europa.eu](https://www.easa.europa.eu/en/domains/civil-drones/privacy/privacy-by-design))

4.4. Market Dynamics

■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■ ■■■■ ■■■■ ■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■ ■■ ■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■■■■ ■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ A favorable development at one gate does not remove the others. Government component vetting can support a shortlist without establishing deployment permission, while a civil operating waiver does not establish eligibility for a restricted procurement.

Regulatory developments can influence procurement timing before they create an enforceable operating entitlement. ■■■ ■■■ ■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■ ■■ ■■■■■■ ■■■■■■ ■■■ ■ ■■■■■■■■■ ■■■■ ■■■ ■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■ ■■■■■■ Effective rules, completed qualifications and

executed service agreements are more decisive commercial triggers than policy announcements or portfolio claims.

Sources & Evidence

1. Part 107 Waivers
   · Operating waivers address particular regulatory requirements and do not establish procurement qualification or network access. ([faa.gov](https://www.faa.gov/uas/commercial_operators/part_107_waivers))
2. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
   · The verification framework establishes a procurement-related gate distinct from civil operating permission. ([diu.mil](https://www.diu.mil/latest/blue-uas-refresh-list-and-framework-platforms-and-capabilities-selected))
3. Notice Soliciting Representatives for Technical Roundtables on Security of Unmanned Aircraft Systems Operating Beyond the Visual Line of Sight
   · The September xx.xx 2026 TSA notice describes the August 2025 joint BVLOS framework and security provisions as proposed. ([federalregister.gov](https://www.federalregister.gov/documents/2026/xx.xx/xx.xx/2026-xx.xx/notice-soliciting-representatives-for-technical-roundtables-on-security-of-unmanned-aircraft-systems))

4.4.1. Key Drivers

4.4.1.1. Remote mission delivery creates communications purchase triggers

Remote inspection and public-safety missions create a purchase trigger when customers need communications supporting remotely operated aircraft and timely mission information. Swisscom's announced drone-service infrastructure connects these use cases with communications and managed services. ■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■■ ■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■

Sources & Evidence

1. Swisscom Broadcast and Nokia build joint drone network across Switzerland
   · The announced service connects remote industrial and public-safety missions with communications infrastructure; completion of the entire announced rollout is not asserted. ([swisscom.ch](https://www.swisscom.ch/en/about/news/2024/xx.xx/xx.xx-drohnennetzwerk-schweiz.html))
2. Part 107 Waivers
   · The waiver framework supports treating operating permission as a separate gate to remote-mission deployment. ([faa.gov](https://www.faa.gov/uas/commercial_operators/part_107_waivers))

4.4.1.2. Continuity requirements support multibearer evaluation

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Sources & Evidence

1. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
   · Halo's advertised use of cellular, RF and satellite relationships supports conditional multibearer evaluation, not an independent continuity guarantee.
   ([elsight.com](https://www.elsight.com/products/halo-for-commercial-use/))
2. Spectrum policy
   · Australia's drone spectrum policy makes cellular suitability dependent on network-operator authorization and coverage for the application.
   ([drones.gov.au](https://www.drones.gov.au/policies-and-programs/policies/spectrum-policy))

4.4.1.3. Service packaging broadens procurement alternatives

Nokia's purchase, lease and flight-hire options, together with bundled maintenance and other services, provide different ways for enterprises to obtain connected-drone capabilities. ■■■■■■■■■ ■■■ ■■■■■■ ■■■ ■■■■■■■■■■■■■■■■ ■ ■■■■■ ■■■■ ■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■■ It supports adoption where the service matches an approved mission, but becomes unsuitable if recurring obligations or provider dependence outweigh the buyer's need for flexibility.

Sources & Evidence

1. Nokia extends partner program to accelerate Drones-as-a-Service business in North America
   · The commercial options change upfront ownership and retained service responsibilities; buyer suitability remains contractual.
   ([nokia.com](https://www.nokia.com/newsroom/nokia-extends-partner-program-to-accelerate-drones-as-a-service-business-in-north-america/))

4.4.1.4. Documented qualification supports component consideration

The Blue UAS Framework recognizes interoperable components and software as distinct procurement choices, supporting consideration of qualified data-link contributions within aircraft programs. ■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■ ■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■ Selection for verification is not the same as completed verification, and listing does not establish an award, delivery capability or applicability to every government procurement.

Sources & Evidence

1. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
   · The Blue UAS Framework provides component and software choices for government and industry partners; pending verification is not completed qualification.
   ([diu.mil](https://www.diu.mil/latest/blue-uas-refresh-list-and-framework-platforms-and-capabilities-selected))

4.4.2. Key Restraints

4.4.2.1. Jurisdiction-specific permissions constrain deployment access

■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■ EASA's specific-category authorization framework and CASA's separate BVLOS approval requirements prevent a supplier from treating one deployment record as Global access. Harmonized or broader approval pathways can reduce repetition, but buyers must still establish that their operation falls within the relevant permission before committing to dependent services.

Sources & Evidence

1. Operational Authorisation
   · Authorization is bounded by its stated limitations and duration; simplified routes provide counterforces to repeated application burdens. ([easa.europa.eu](https://www.easa.europa.eu/en/domains/drones-air-mobility/operating-drone/specific-category-civil-drones/operational-authorisation))
2. Beyond visual line-of-sight operations
   · CASA separately requires operator certification, pilot qualification and BVLOS flight approval, and identifies a broader-area trial pathway. ([casa.gov.au](https://www.casa.gov.au/drones/flight-authorisations/beyond-visual-line-sight-operations))

4.4.2.2. Spectrum and network permissions limit usable alternatives

Radio availability does not establish spectrum or network access. Ofcom requires network-operator agreement for the mobile and satellite uses covered by its UAS framework, and Australia's policy identifies authorization and coverage as cellular prerequisites. ■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■ ■■■■■■■■■■ ■■ ■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■

Sources & Evidence

1. Spectrum policy
   · Authorized network admission and suitable coverage are separate prerequisites from possessing cellular-capable equipment. ([drones.gov.au](https://www.drones.gov.au/policies-and-programs/policies/spectrum-policy))
2. Statement: Spectrum for Unmanned Aircraft Systems (UAS)
   · The framework retains network agreement and aviation requirements alongside radio authorization and existing exemptions. ([ofcom.org.uk](https://www.ofcom.org.uk/spectrum/radio-equipment/spectrum-for-unmanned-aircraft-systems))
3. Spectrum Rules and Policies for the Operation of Unmanned Aircraft Systems
   · The function-limited framework does not establish permission for unrelated mission-payload communications. ([federalregister.gov](https://www.federalregister.gov/documents/2025/xx.xx/xx.xx/2024-xx.xx/spectrum-rules-and-policies-for-the-operation-of-unmanned-aircraft-systems))

4.4.2.3. Installed ecosystem commitments constrain substitution

Proprietary compatibility can constrain replacement purchasing. ■■■■■ ■■ ■■■ ■■■■ ■■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■ This is an offering-specific switching restraint, not proof that all drone links are closed ecosystems or that an entire aircraft must be replaced.

Sources & Evidence

1. DJI O4 Air Unit Series - FAQ
   · DJI's O4 Air Unit FAQ excludes third-party goggles and identifies only partial accessory compatibility with the preceding generation. ([dji.com](https://www.dji.com/o4-air-unit/faq))

4.4.3. Key Opportunities

4.4.3.1. Accountable communications packages for qualified aircraft programs

Aircraft programs can purchase a compatibility-defined communications package rather than coordinate originating components independently. ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ Government component consideration adds a separate eligibility gate; a partner relationship or verification selection does not supply portable qualification.

Sources & Evidence

1. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
   · The Blue UAS Framework distinguishes components and software from complete aircraft and separates verification selections from completed additions. ([diu.mil](https://www.diu.mil/latest/blue-uas-refresh-list-and-framework-platforms-and-capabilities-selected))
2. Datalinks | UAV Navigation
   · UAV Navigation identifies Microhard modems within TELEM07 variants and states compatibility with its autopilots. ([uavnavigation.com](https://uavnavigation.com/products/peripherals/datalinks))

4.4.3.2. Contracted coordination across connectivity counterparties

Operators administering terminal, software and network relationships can purchase defined coordination duties. Galaxy xx.xx's announced Velaris delivery layer provides a concrete example. ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪

Sources & Evidence

1. Galaxy 1 partners with Viasat to deliver rapid, scalable and secure communications for uncrewed aircraft
   · The March xx.xx 2026 Galaxy xx.xx collaboration describes Velaris provisioning, billing, integration and lifecycle coordination, not customer-specific contractual guarantees. ([viasat.com](https://www.viasat.com/news/latest-news/aviation/2026/galaxy-xx.xx-partners-with-viasat/))
2. Statement: Spectrum for Unmanned Aircraft Systems (UAS)
   · Ofcom requires network-operator agreement for covered mobile and satellite use, separately from aviation compliance. ([ofcom.org.uk](https://www.ofcom.org.uk/spectrum/radio-equipment/spectrum-for-unmanned-aircraft-systems))

4.4.3.3. Supported continuity for installed equipment and entitlements

Installed buyers need continuity of compatible equipment, software rights and support rather than indiscriminate replacement. ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ Hardware ownership alone does not settle that continuity.

Sources & Evidence

1. Drones (UAS)
   - EASA requires specific-category aircraft to meet the applicable operational authorization's requirements. ([easa.europa.eu](https://www.easa.europa.eu/en/the-agency/faqs/drones-uas))
2. Read our Terms & Conditions
   - Elsight's terms separate embedded-software rights, automatic cloud renewal and purchased support coverage. ([elsight.com](https://www.elsight.com/terms-conditions/))
3. DJI O4 Air Unit Series - FAQ - DJI
   - DJI's O4 documentation excludes third-party goggles while separately permitting specified third-party controller relationships. ([dji.com](https://www.dji.com/o4-air-unit/faq))

4.4.3.4. Verified data-bearing offerings for tether-compatible missions

Tether-compatible missions create a bounded purchasing context for electrical and optical-fiber communications. Gore's cable contribution and Elistair's aircraft-dependent data-transfer arrangements occupy different delivery levels. ■■■■■■■■■ ■■■ ■■■■■■■ ■■■■ ■■■■ ■■■■ ■■■ ■■■■■ ■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■ ■■■ ■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■ ■ ■■■■■■■■■■■■■■■■ ■■■■■■ ■■ ■■■ ■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■

Sources & Evidence

1. GORE Tethered Drone Cables for Commercial & Defense
   - Gore markets drone-specific tether cables with communications-bearing electrical and optical-fiber contributions, distinct from complete station supply. ([gore.com](https://www.gore.com/products/tethered-drone-cables-commercial-defense))
2. Support - Elistair | Tethered Drone Company
   - Elistair states that tethered data transfer depends on the aircraft and can remain wireless despite tether compatibility. ([elistair.com](https://elistair.com/client-support/))

4.4.4. Key Challenges

4.4.4.1. Assigning accountability across communications providers

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Sources & Evidence

1. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
   - Elsight describes Allsight management in cloud and on-premises forms, establishing distinct software-management roles. ([elsight.com](https://www.elsight.com/products/halo-for-commercial-use/))
2. Galaxy 1 partners with Viasat to deliver rapid, scalable and secure communications for uncrewed aircraft
   - The partnership describes monitoring, cybersecurity and lifecycle-management roles, but does not establish a particular buyer's contractual responsibility transfer. ([viasat.com](https://www.viasat.com/news/latest-news/aviation/2026/galaxy-xx.xx-partners-with-viasat/))

4.4.4.2. Maintaining compliance through supplier and offering changes

EASA requires a drone used in the specific category to meet the requirements of its operational authorization. A replacement link or changed service arrangement therefore needs a compliance assessment before procurement, rather than an assumption that category similarity preserves authorization. ■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■ ■■■■ ■■■ ■■■■■ ■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■

Sources & Evidence

1. Drones (UAS)
   - A drone used in the specific category must meet the requirements defined in its operational authorization. ([easa.europa.eu](https://www.easa.europa.eu/en/the-agency/faqs/drones-uas))

4.4.4.3. Maintaining eligibility as component-based access rules change

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Sources & Evidence

1. Protecting Against National Security Threats to the Communications Supply Chain Through the Equipment Authorization Program
   - The final rule published September xx.xx 2026 is effective October xx.xx 2026 and addresses specified Covered List entities' logic-bearing hardware. ([federalregister.gov](https://www.federalregister.gov/documents/2026/xx.xx/xx.xx/2026-xx.xx/protecting-against-national-security-threats-to-the-communications-supply-chain-through-the))
   - Its scope excludes broader component prohibitions and contains protections for previously authorized equipment and specified pending applications. ([federalregister.gov](https://www.federalregister.gov/documents/2026/xx.xx/xx.xx/2026-xx.xx/protecting-against-national-security-threats-to-the-communications-supply-chain-through-the))

4.4.4.4. Coordinating link delivery with interoperable aviation services

The FAA describes UTM as automated, API-based coordination and identifies continuing work on service recognition, standards and interoperability. A data link's ability to transport information does not establish acceptance by every traffic-management or mission-service endpoint. ■■■■■■■■■■■ ■■■■ ■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■ ■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■■

Sources & Evidence

1. Unmanned Aircraft System Traffic Management (UTM)
   - The FAA describes automated API-based UTM coordination, continuing interoperability work and a process for evaluating third-party services. ([faa.gov](https://www.faa.gov/uas/advanced_operations/traffic_management))

4.5. Porter’s Five Forces Analysis

[redacted] A supplier's relevant competitive set is the set of offerings acceptable to the aircraft program, mission and jurisdiction, rather than every product carrying a drone-connectivity label. Entry through a component offering avoids owning the entire communications service, but does not remove customer integration or deployment-compliance requirements.

[redacted] This illustrates how existing receiver and accessory commitments can limit substitution after purchase. Buyers should establish replacement rights and supported compatibility before selection; apparent availability of another transmitter does not demonstrate an economical or authorized migration.

Network providers can retain bargaining leverage even when terminal suppliers advertise carrier flexibility. [redacted] Multibearer purchasing can broaden the available provider set, but it does not eliminate these access gates or establish independent service commitments.

Substitution is bounded by the mission. [redacted] Operators should compare qualified ways of obtaining the required communications outcome, including customer-managed and provider-managed arrangements, rather than treating every included technology as a universal substitute.

Sources & Evidence

1. New Doodle Labs Mesh Rider Radio offerings expand band flexibility and ease of integration
   · OEM-form products establish a component-supply role distinct from continuing network-service delivery. ([doodlelabs.com](https://doodlelabs.com/blog/new-offerings-expand-flexibility-integration))
2. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
   · Halo illustrates a multibearer management architecture distinct from standalone radio components and dedicated satellite services. ([elsight.com](https://www.elsight.com/products/halo-for-commercial-use/))
3. Velaris - BVLOS connectivity for UAVs
   · Velaris establishes a satellite-service alternative whose mission suitability is distinct from a tethered communications offering. ([viasat.com](https://www.viasat.com/aviation/advanced-air-mobility/velaris/))
4. Safe-T Drone Power Station
   · The offering is a tethered station; its ground connection makes substitution conditional on the mission's mobility requirements. ([elistair.com](https://elistair.com/solutions/tethering-station-safe-t/))

5. Drones (UAS)
   · Aircraft-level compliance requirements constrain which component alternatives can be accepted; component availability alone does not settle eligibility. ([easa.europa.eu](https://www.easa.europa.eu/en/the-agency/faqs/drones-uas))
6. Spectrum policy
   · Network authorization and application coverage support the conclusion that provider flexibility does not eliminate access dependencies. ([drones.gov.au](https://www.drones.gov.au/policies-and-programs/policies/spectrum-policy))
7. Statement: Spectrum for Unmanned Aircraft Systems (UAS)
   · Network-operator agreement provides an access gate that terminal-level provider flexibility does not remove. ([ofcom.org.uk](https://www.ofcom.org.uk/spectrum/radio-equipment/spectrum-for-unmanned-aircraft-systems))
8. DJI O4 Air Unit Series - FAQ
   · The documented receiver and accessory restrictions support an offering-specific switching constraint, not a market-wide closed-ecosystem conclusion. ([dji.com](https://www.dji.com/o4-air-unit/faq))

4.6. PESTLE Analysis

[illegible] Importers should establish the applicable product classification, origin and exemption before committing to a delivery obligation; a general-purpose communications label does not settle whether a particular drone-link offering falls within the listed products. These measures create jurisdiction-specific sourcing exposure, not a uniform Global preference for domestic suppliers.

Economic exposure differs between equipment ownership and service procurement. Nokia's purchase, lease and flight-hire alternatives illustrate how buyers can change the timing and responsibility of expenditure. [illegible]

[illegible] Buyers and integrators should distinguish that supplier claim from verified patent scope, territorial protection and contractual software rights. Compatibility, maintenance access and license continuity can influence replacement decisions even where alternative communications products exist.

Privacy and environmental obligations extend the evaluation beyond communications availability. EASA identifies data-protection responsibilities and the possibility of privacy-related geographic restrictions. [illegible]

RESEARCH SAMPLE REPORT

[redacted]

Sources & Evidence

1. New Doodle Labs Mesh Rider Radio offerings expand band flexibility and ease of integration
   · Doodle Labs describes its multiband technology as patented; the page does not establish territorial patent scope or market-wide exclusivity.
   ([doodlelabs.com](https://doodlelabs.com/blog/new-offerings-expand-flexibility-integration))
2. Nokia extends partner program to accelerate Drones-as-a-Service business in North America
   · The offered ownership alternatives support the conditional expenditure-timing analysis, not an assertion of universal economic advantage.
   ([nokia.com](https://www.nokia.com/newsroom/nokia-extends-partner-program-to-accelerate-drones-as-a-service-business-in-north-america/))
3. Adjusting Imports of Unmanned Aircraft Systems and Unmanned Aircraft Systems Components Into the United States
   · The August xx.xx 2026 proclamation establishes tariffs for specified UAS and components with phased dates, exceptions and conditional treatment.
   ([federalregister.gov](https://www.federalregister.gov/documents/2026/xx.xx/xx.xx/2026-xx.xx/adjusting-imports-of-unmanned-aircraft-systems-and-unmanned-aircraft-systems-components-into-the))
   · Its defined product scope supports classification-specific diligence rather than assuming that every communications product is covered.
   ([federalregister.gov](https://www.federalregister.gov/documents/2026/xx.xx/xx.xx/2026-xx.xx/adjusting-imports-of-unmanned-aircraft-systems-and-unmanned-aircraft-systems-components-into-the))
4. Privacy by Design
   · The guidance supports examining data access, retention and responsibility separately from flight and communications permission.
   ([easa.europa.eu](https://www.easa.europa.eu/en/domains/civil-drones/privacy/privacy-by-design))
5. Waste from Electrical and Electronic Equipment (WEEE)
   · The European Commission describes WEEE requirements for separate collection and treatment, supporting conditional lifecycle-responsibility diligence for covered link equipment.
   ([environment.ec.europa.eu](https://environment.ec.europa.eu/topics/waste-and-recycling/waste-electrical-and-electronic-equipment-weee_en))

4.7. Market Outlook

The commercial outlook through 2032 depends on converting mission demand into authorized, supported purchases rather than on the proliferation of connectivity options alone. [redacted] Effective permissions, completed procurement acceptance and executed delivery commitments are therefore more meaningful turning points than an announced capability or anticipated rule.

Two commercial outcomes remain plausible. More reusable access pathways could broaden the set of purchase-ready propositions, while continuing management dependencies can preserve incumbent relationships after hardware delivery. [redacted]

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Sources & Evidence

1. Part 107 Waivers
   · Part xx.xx waivers establish an operation-specific access pathway rather than an equipment purchasing entitlement. ([faa.gov](https://www.faa.gov/uas/commercial_operators/part_107_waivers))
2. Notice Soliciting Representatives for Technical Roundtables on Security of Unmanned Aircraft Systems Operating Beyond the Visual Line of Sight
   · The September xx.xx 2026 TSA notice describes the joint BVLOS framework as proposed and its regulatory requirements as being finalized. ([federalregister.gov](https://www.federalregister.gov/documents/2026/xx.xx/xx.xx/2026-xx.xx/notice-soliciting-representatives-for-technical-roundtables-on-security-of-unmanned-aircraft-systems))
3. 2025 Summary of changes to Canada's drone regulations
   · Canada provides a qualifying lower-risk BVLOS pathway with pilot and operator certification requirements, not unrestricted remote-operation permission. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
4. SkyLink - uAvionix
   · uAvionix states that SkyLink requires SkyLine management integration for full functionality, establishing a continuing management dependency. ([uavionix.com](https://uavionix.com/product/skylink/))

4.7.1. Near-Term Market Outlook (0-2 Years)

For 2026-2027, the actionable outlook centers on access-status resolution. Canada's rules applicable November xx.xx 2025 provide a defined route for qualifying lower-risk BVLOS operations, whereas the September xx.xx 2026 U.S. notice described a proposed framework still being finalized. ■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■■■■■■■ ■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■■■ ■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■ ■ ■■■■■■ ■■ ■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■■■ ■■■ ■■■■■■■■■■ ■■■

U.S. channel diligence also faces defined implementation milestones. ■■■ ■■■ ■■■■■■■■■ ■■■■■ ■■ ■■■■■■■■■ ■■ ■■■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■ ■■ ■■■■ ■■■ ■■■■ ■■ ■■■■ ■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■ ■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■■ The new component prohibition preserves previously authorized equipment within its terms, so targeted eligibility checks are more appropriate than indiscriminate installed-system replacement.

Sources & Evidence

1. Part 107 Waivers
   · The published waiver pathway supports separating permission-backed purchasing from commitments dependent on another regulatory framework. ([faa.gov](https://www.faa.gov/uas/commercial_operators/part_107_waivers))

2. Notice Soliciting Representatives for Technical Roundtables on Security of Unmanned Aircraft Systems Operating Beyond the Visual Line of Sight
   - The notice supports treating a proposed framework separately from existing operating entitlements. ([federalregister.gov](https://www.federalregister.gov/documents/2026/xx.xx/xx.xx/2026-xx.xx/notice-soliciting-representatives-for-technical-roundtables-on-security-of-unmanned-aircraft-systems))
3. Protecting Against National Security Threats to the Communications Supply Chain Through the Equipment Authorization Program
   - The FCC final rule is effective October xx.xx 2026; marketplace FCC-ID display compliance dates are March xx.xx 2027 and June xx.xx 2027 for the specified marketplace categories. ([federalregister.gov](https://www.federalregister.gov/documents/2026/xx.xx/xx.xx/2026-xx.xx/protecting-against-national-security-threats-to-the-communications-supply-chain-through-the))
   - The new logic-bearing component prohibition applies prospectively and does not revoke previously authorized equipment. ([federalregister.gov](https://www.federalregister.gov/documents/2026/xx.xx/xx.xx/2026-xx.xx/protecting-against-national-security-threats-to-the-communications-supply-chain-through-the))
4. 2025 Summary of changes to Canada's drone regulations
   - Rules applicable November xx.xx 2025 permit qualifying lower-risk BVLOS operations without an SFOC-RPAS, subject to defined credentials and operating conditions. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))

4.7.2. Medium-Term Market Outlook (3-5 Years)

[redacted] Incumbents should secure those commitments rather than assume hardware ownership guarantees retention. Buyers should reassess the arrangement when renewal changes control rights or leaves required equipment outside support; a qualified alternative becomes preferable when continuity cannot be maintained.

[redacted] This can require additional qualification work and reduce the convenience of a common package. The observable indicator is an accepted, independently sourced alternative, not the number of intermediary relationships.

Sources & Evidence

1. Triad High Power Radio Systems For Unmanned Land Air Sea
   - Triad identifies originating radios within configured systems, including Silvus products; another package seller need not diversify the originating supply relationship. ([triadrf.com](https://triadrf.com/radio-systems/))
2. StreamCare+ - Silvus Technologies
   - Silvus markets StreamCare+ as a separately purchased support program with differing coverage options. ([silvustechnologies.com](https://silvustechnologies.com/resources/streamcare-plus/))

3. SkyLink - uAvionix
   · SkyLink's documented management dependency supports a conditional renewal-and-continuity outlook, not a forecast of customer retention. ([uavionix.com](https://uavionix.com/product/skylink/))
4. Unleashing the Power of Swappable Radio Modules (SRM): The Future of Connectivity Is Here.
   · UXV's SRM integrations incorporate named originating radio suppliers, supporting a distinction between configured choice and upstream independence. ([uxvtechnologies.com](https://www.uxvtechnologies.com/news/unleashing-the-power-of-swappable-radio-modules-srm-the-future-of-connectivity-is-here))

4.7.3. Long-Term Market Outlook (5-10 Years)

For 2030-2032, a more established aviation-service ecosystem could make recognized service relationships and continuing interoperability responsibility increasingly consequential to procurement. [illegible] A common commercial contract should preserve those separate commitments rather than promise transferable Global permission.

[illegible] Historical activity is counterevidence to category inactivity, but satellite-business progress is not proof of airborne purchase readiness. The decisive indicator is an accountable UAV offer, not an extrapolated technology milestone.

Sources & Evidence

1. Drones (UAS)
   · EASA's relevant cross-border pathway retains destination confirmation and local conditions despite reusable home-state authorization. ([easa.europa.eu](https://www.easa.europa.eu/en/the-agency/faqs/drones-uas))
2. Unmanned Aircraft System Traffic Management (UTM)
   · The FAA describes ongoing UTM service-recognition and interoperability work; its NTAP pathway requires an aligned service-provider and operator relationship. ([faa.gov](https://www.faa.gov/uas/advanced_operations/traffic_management))
3. Mynaric AG Form 20-F for the Year Ended December 31, 2021
   · Mynaric's 2021 annual filing identifies HAWK airborne terminals and UAV customer targeting; historical activity does not establish a presently supported procurement offer. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/d310942d20f.htm))

4. Rocket Lab Completes Mynaric Acquisition, Adding Laser Optical Communications To Growing Space Systems Portfolio
   · Rocket Lab announced Mynaric acquisition completion on April xx.xx 2026, emphasizing satellite and space-system relationships rather than a current HAWK UAV supply commitment. ([rocketlabcorp.com](https://rocketlabcorp.com/updates/rocket-lab-completes-mynaric-acquisition-adding-laser-optical-communications-to-growing-space-systems-portfolio/index.php))

4.8. Go-to-Market Strategy

A component entrant should target the aircraft OEM or systems integrator that controls communications acceptance, with a proposition tied to a named deliverable rather than a general BVLOS claim. ■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■ ■■ ■ ■■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■ ■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■ ■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■ ■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■ ■■■ ■■■ ■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ For screened government procurement, verify the actual offering and solicitation eligibility before promising access.

A managed-connectivity proposition should address an operator's documented coordination burden. Galaxy xx.xx's announced Velaris role identifies provisioning and lifecycle services that a delivery partner can contribute. ■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■ ■■ ■■■■■■■■■■■ ■■■■ ■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■

Commercial execution should progress from a confirmed buyer and accepted deliverable to offering-specific eligibility, then to documented entitlements and delivery obligations. Quotes should distinguish equipment, software rights, connectivity and lifecycle support, including exclusions and continuing commitments. ■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■ ■■ ■■■■■■■■■ ■■■■■■■■■ ■■■ ■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■

Sources & Evidence

1. Galaxy 1 partners with Viasat to deliver rapid, scalable and secure communications for uncrewed aircraft
   · Galaxy xx.xx's announced contribution supplies an identifiable managed-delivery role beyond terminal resale. ([viasat.com](https://www.viasat.com/news/latest-news/aviation/2026/galaxy-xx.xx-partners-with-viasat/))

2. Nokia extends partner program to accelerate Drones-as-a-Service business in North America

   · Nokia's North American partner program offers acquisition alternatives and bundled maintenance, analytics and scheduling, with regulator coordination where required. ([nokia.com](https://www.nokia.com/newsroom/nokia-extends-partner-program-to-accelerate-drones-as-a-service-business-in-north-america/))

3. Part 107 Waivers

   · Operating permission is distinct from the equipment and service commitments proposed by a communications supplier. ([faa.gov](https://www.faa.gov/uas/commercial_operators/part_107_waivers))

4. Statement: Spectrum for Unmanned Aircraft Systems (UAS)

   · A managed distribution relationship cannot independently grant the network consent required by the UK framework. ([ofcom.org.uk](https://www.ofcom.org.uk/spectrum/radio-equipment/spectrum-for-unmanned-aircraft-systems))

5. Blue UAS Refresh List, Framework Platforms and Capabilities Selected

   · The historical framework announcement supports offering-specific procurement checks, not portable qualification across supplier portfolios or solicitations. ([diu.mil](https://www.diu.mil/latest/blue-uas-refresh-list-and-framework-platforms-and-capabilities-selected))

6. Read our Terms & Conditions

   · The published terms exclude unlisted network connections and third-party software integration, supporting explicit quote boundaries. ([elsight.com](https://www.elsight.com/terms-conditions/))

7. Doodle Labs announces launch of Reseller Program

   · Doodle Labs' reseller program expressly includes value-added resellers, systems integrators and distributors, establishing commercial channel alternatives rather than transferable customer qualification. ([doodlelabs.com](https://doodlelabs.com/blog/announces-launch-of-reseller-program))

8. Datalinks | UAV Navigation

   · TELEM07 establishes a named compatibility-defined package route distinct from purchasing the originating modem alone. ([uavnavigation.com](https://uavnavigation.com/products/peripherals/datalinks))

5. Market Insights

5.1. Consumer Insights & End-User Perspective

The purchase trigger is the required communications contribution to a mission, but the economic buyer need not be the ultimate user. ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ Buyers should name the mission-budget owner, aircraft acceptance authority and service-contract owner before defining the procurement; these roles should not be presumed to reside in one organization.

Government qualification is a separate acceptance filter. DIU's Blue UAS Framework distinguishes components and software from complete aircraft and separates candidates undergoing verification from completed additions. ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪

Installed compatibility and intellectual-property rights create distinct switching conditions. ▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ These are offering-specific constraints; neither a patent claim nor an integrated ecosystem establishes exclusivity across the entire market.

Sources & Evidence

1. New Doodle Labs Mesh Rider Radio offerings expand band flexibility and ease of integration
   · Doodle Labs describes its multiband technology as patented; the announcement does not establish territorial patent scope or category-wide exclusivity. ([doodlelabs.com](https://doodlelabs.com/blog/new-offerings-expand-flexibility-integration))
2. Swisscom Broadcast and Nokia build joint drone network across Switzerland
   · Swisscom announced inspection and public-safety drone services combining infrastructure, application support and data storage; this documents a mission-service purchasing alternative. ([swisscom.ch](https://www.swisscom.ch/en/about/news/2024/xx.xx/xx.xx-drohnennetzwerk-schweiz.html))
3. Drones (UAS)
   · EASA requires aircraft used in the specific category to comply with requirements defined in their operational authorization. ([easa.europa.eu](https://www.easa.europa.eu/en/the-agency/faqs/drones-uas))
4. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
   · DIU distinguishes interoperable components and software from complete platforms, and selections awaiting verification from completed additions. ([diu.mil](https://www.diu.mil/latest/blue-uas-refresh-list-and-framework-platforms-and-capabilities-selected))

5. DJI O4 Air Unit Series - FAQ
   · DJI's O4 Air Unit documentation excludes third-party goggles and identifies partial accessory compatibility with O3. ([dji.com](https://www.dji.com/o4-air-unit/faq))
6. Read our Terms & Conditions
   · Elsight grants a nontransferable license for software embedded in its products. ([elsight.com](https://www.elsight.com/terms-conditions/))

5.2. Consumer Experience Benchmarking

Buyer experience is most defensibly compared through integration burden, supported compatibility, management control and support responsibility. ■■■■■■ ■■■■■ ■■■ ■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■ ■■ ■■■ ■■■■ ■■■■■■■■ ■■■■■■ ■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ An aircraft integrator and an individual video-link buyer face different acceptance and replacement decisions.

■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■ ■ ■■■■■■■■■■■■■ ■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■ These offerings can consolidate management relationships, but public continuity claims and service descriptions do not establish equivalent buyer-specific guarantees. Procurement comparisons should identify the remaining network counterparties, incident-resolution owner and contractual exclusions before treating a component proposal and a managed-service proposal as comparable.

Mission constraints also change the relevant comparison. Elistair's Safe-T xx.xx optical-fiber option retains a ground tether and requires aircraft compatibility confirmation; it is not interchangeable with unrestricted mobile deployment. ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■ ■ ■■■■■■■■■■■ ■■■■■ ■■ ■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■■■■ ■■■■■■■■■

Sources & Evidence

1. New Doodle Labs Mesh Rider Radio offerings expand band flexibility and ease of integration
   · Doodle Labs offers OEM-form radios intended as integrated components, establishing a different deliverable from a managed connectivity service. ([doodlelabs.com](https://doodlelabs.com/blog/new-offerings-expand-flexibility-integration))
2. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
   · Elsight markets multibearer connectivity with cloud and on-premises management options; its continuity statements are supplier claims, not buyer-specific contractual guarantees. ([elsight.com](https://www.elsight.com/products/halo-for-commercial-use/))
3. Safe-T Drone Power Station
   · Elistair markets Safe-T xx.xx as a tethered station with an optical-fiber option and requests offering-specific aircraft compatibility confirmation. ([elistair.com](https://elistair.com/solutions/tethering-station-safe-t/))
4. Galaxy 1 partners with Viasat to deliver rapid, scalable and secure communications for uncrewed aircraft
   · Viasat's Galaxy xx.xx announcement describes provisioning, monitoring and lifecycle management, supporting comparison of offered service responsibilities rather than equipment alone. ([viasat.com](https://www.viasat.com/news/latest-news/aviation/2026/galaxy-xx.xx-partners-with-viasat/))

5. Spectrum policy
   · Australia's spectrum policy identifies network admission and application coverage as prerequisites for cellular drone connectivity.
   ([drones.gov.au](https://www.drones.gov.au/policies-and-programs/policies/spectrum-policy))
6. DJI O4 Air Unit Series - FAQ
   · The documented supported receiver ecosystem provides an offering-specific compatibility benchmark, not a market-wide performance comparison. ([dji.com](https://www.dji.com/o4-air-unit/faq))

5.3. Opportunity Mapping

Commercial accessibility provides a stronger prioritization basis than an application label. Suppliers should first identify an accountable aircraft or service buyer, an applicable permission pathway and a communications deliverable that the customer can accept. ■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■ ■■■■■ ■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■ ■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■ ■■ ■■■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■ ■■■■■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■ ■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■ ■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ Direct supply is preferable when the OEM can retain those duties and wants the originating relationship. Government opportunities add solicitation-specific eligibility: historical Blue UAS verification selection is not sufficient purchase authorization.

Managed connectivity is a conditional opportunity for operators that otherwise administer fragmented equipment, software and network relationships. ■■■ ■■■■■■ ■ ■■■ ■■■■■■ ■■■■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■ ■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■ ■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■ ■■■■■■ ■■ ■ ■■■■■■ ■■■■■■■ Public-safety customers require additional caution because NIST identifies emergency environments with degraded infrastructure; a general service offering cannot establish incident-time availability.

Installed-fleet continuity presents a different opportunity from winning a new aircraft program. ■■■■■■ ■■■■■■■ ■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■ ■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■ ■■■■■■ ■■■

[redacted] Unsupported retention and premature wholesale replacement are both unsuitable alternatives; the commercial opening is an accountable continuity decision, not presumed ecosystem lock-in.

[redacted] This route is appropriate only where the mission accepts the ground connection; mobility-dependent missions favor another qualified offering. Its inclusion in the study does not establish a universal substitute or eliminate aircraft authorization.

Sources & Evidence

1. Galaxy 1 partners with Viasat to deliver rapid, scalable and secure communications for uncrewed aircraft
   · The collaboration supports a coordination-based channel proposition; actual transferred duties and service commitments remain agreement-specific. ([viasat.com](https://www.viasat.com/news/latest-news/aviation/2026/galaxy-xx.xx-partners-with-viasat/))
2. Drones (UAS)
   · Authorization conformity constrains installed-equipment migration independently of commercial compatibility. ([easa.europa.eu](https://www.easa.europa.eu/en/the-agency/faqs/drones-uas))
3. Spectrum policy
   · Australian guidance makes usable cellular connectivity conditional on network admission and application coverage. ([drones.gov.au](https://www.drones.gov.au/policies-and-programs/policies/spectrum-policy))
4. Statement: Spectrum for Unmanned Aircraft Systems (UAS)
   · The UK framework retains separate radio, network and aviation access relationships, limiting unconditional managed-service promises. ([ofcom.org.uk](https://www.ofcom.org.uk/spectrum/radio-equipment/spectrum-for-unmanned-aircraft-systems))
5. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
   · Government component consideration is an identifiable access route, but selection for verification is not an award or universal purchasing eligibility. ([diu.mil](https://www.diu.mil/latest/blue-uas-refresh-list-and-framework-platforms-and-capabilities-selected))
6. GORE Tethered Drone Cables for Commercial & Defense
   · The cable portfolio supports a component-supply opportunity only with separately assigned system delivery responsibility. ([gore.com](https://www.gore.com/products/tethered-drone-cables-commercial-defense))
7. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
   · NIST identifies first-responder communications needs in environments with degraded or destroyed infrastructure, challenging assumptions of ordinary service availability. ([nist.gov](https://www.nist.gov/ctl/pscr/research-portfolios/uncrewed-aircraft-systems))

8. 2025 Summary of changes to Canada’s drone regulations
   · The Canadian pathway identifies a conditional customer qualification context; an individual operator's eligibility still requires confirmation. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
9. StreamCare+ - Silvus Technologies
   · The marketed support program establishes an identifiable lifecycle purchasing alternative without guaranteeing coverage of individual installed equipment. ([silvustechnologies.com](https://silvustechnologies.com/resources/streamcare-plus/))
10. Datalinks | UAV Navigation
   · The named package relationship supports comparing an integrator deliverable with direct component supply without assuming equivalent obligations. ([uavnavigation.com](https://uavnavigation.com/products/peripherals/datalinks))
11. DJI O4 Air Unit Series - FAQ - DJI
   · The O4 compatibility boundary supports function-specific migration assessment rather than assuming unrestricted replacement. ([dji.com](https://www.dji.com/o4-air-unit/faq))
12. Support - Elistair | Tethered Drone Company
   · Aircraft-dependent data transfer and separately identified maintenance arrangements support configuration-specific purchasing and support checks. ([elistair.com](https://elistair.com/client-support/))
13. ドローン向け上空 LTE SIM なら上空電波パッケージ | DJI 対応 | KDDI スマートドローン
   · KDDI SmartDrone separates aerial LTE admission from management-system eligibility and describes its coverage map as indicative rather than guaranteed. ([kddi.smartdrone.co.jp](https://kddi.smartdrone.co.jp/communication/4g-lte/))

5.4. Distribution Channel Analysis

Distribution and retail routes can affect support entitlement as well as purchasing convenience. ■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■ ■■ ■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■ ■■ ■■ ■■■ ■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■■■■ A retail listing does not itself establish a supported replacement or repair relationship.

Value-added distribution contributes a different commercial service. ■■■ ■■■■■■ ■■■ ■■■■■■ ■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■ ■■■■ ■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■ ■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■ ■■■ ■■■■■ ■■■■■■■■ ■■ ■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ Sales channel and network-management model remain separate choices: an intermediary sale does not necessarily transfer ongoing management.

■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ A service partner can coordinate these relationships but cannot independently grant aviation or network permission. Direct purchasing preserves buyer control where internal integration and supplier management are available; an integrator route is suitable only when its contract addresses the specific coordination burden without obscuring retained operator and supplier responsibilities.

Sources & Evidence

1. Galaxy 1 partners with Viasat to deliver rapid, scalable and secure communications for uncrewed aircraft
   · The March xx.xx 2026 collaboration assigns Galaxy xx.xx a managed distribution role covering provisioning, billing, integration and lifecycle visibility for Velaris. ([viasat.com](https://www.viasat.com/news/latest-news/aviation/2026/galaxy-xx.xx-partners-with-viasat/))
2. Nokia extends partner program to accelerate Drones-as-a-Service business in North America
   · Nokia's partner program offers bundled maintenance, analytics and scheduling, alongside coordination with relevant regulators. ([nokia.com](https://www.nokia.com/newsroom/nokia-extends-partner-program-to-accelerate-drones-as-a-service-business-in-north-america/))
3. Spectrum policy
   · Australia assigns equipment-rule compliance responsibilities to suppliers and network admission responsibilities to the relevant network relationship. ([drones.gov.au](https://www.drones.gov.au/policies-and-programs/policies/spectrum-policy))
4. Statement: Spectrum for Unmanned Aircraft Systems (UAS)
   · Ofcom requires relevant network-operator agreement for mobile and satellite use under its UAS framework; an intermediary cannot independently grant that permission. ([ofcom.org.uk](https://www.ofcom.org.uk/spectrum/radio-equipment/spectrum-for-unmanned-aircraft-systems))
5. Where To Buy
   · DJI distinguishes official and authorized sales channels and states that purchases from unauthorized dealers are outside its warranty services. ([dji.com](https://www.dji.com/where-to-buy/online-retails))
6. After-sale Service Policies
   · DJI's after-sales policy covers purchases from DJI and authorized dealers within its stated terms and requires proof of purchase. ([m.dji.com](https://m.dji.com/service_policy))

5.5. Pricing Trend Analysis

Drone-data-link pricing is shaped by the contractual deliverable, not hardware alone. ■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■ ■■■■■■■■ Nokia's purchase, lease and flight-hire alternatives illustrate expenditure-timing choices, but do not establish that service procurement is universally preferable.

■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■ Buyers should negotiate inclusions, renewal and change clauses; distributors making fixed commitments need corresponding supplier obligations. Any negotiated concession should preserve comparable service scope rather than conceal responsibilities returned to the customer.

Trade and currency exposure can change these negotiations independently of product suitability. ■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■ ■■■ ■■■■ ■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■ ■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■■■

[redacted] Contract currency, conversion responsibility and duty allocation should therefore be settled before commitment; pass-through depends on the agreement, not merely the existence of an external cost increase.

Sources & Evidence

1. Nokia extends partner program to accelerate Drones-as-a-Service business in North America
   · Nokia offers purchase, lease and flight-hire alternatives, establishing expenditure-timing choices rather than a universal economic advantage.
   ([nokia.com](https://www.nokia.com/newsroom/nokia-extends-partner-program-to-accelerate-drones-as-a-service-business-in-north-america/))
2. Adjusting Imports of Unmanned Aircraft Systems and Unmanned Aircraft Systems Components Into the United States
   · The August xx.xx 2026 U.S. proclamation establishes product-defined UAS tariff treatment with phased dates, origin conditions and exceptions.
   ([federalregister.gov](https://www.federalregister.gov/documents/2026/xx.xx/xx.xx/2026-xx.xx/adjusting-imports-of-unmanned-aircraft-systems-and-unmanned-aircraft-systems-components-into-the))
3. Read our Terms & Conditions
   · Elsight's standard terms provide automatic cloud-service renewal, integration and network exclusions, tax and duty exclusions, and conditional quote adjustments.
   ([elsight.com](https://www.elsight.com/terms-conditions/))
4. Elsight Investor Webinar - Q4 2025
   · Elsight describes system sales, mandatory recurring cloud services, optional premium features and usage-based connectivity charges; its risk disclosures identify foreign-exchange exposure.
   ([elsight.com](https://www.elsight.com/wp-content/uploads/2026/xx.xx/ELS-Investor-webinar-Q4-2025.pdf))

5.6. Regulatory Compliance & Standards Framework

[redacted] These routes attach to the applicable operation and conditions; marketed BVLOS capability is not a transferable operating entitlement. Buyers should establish the relevant permission before accepting a deployment-dependent commitment.

[redacted] Integrated flight and payload offerings consequently require confirmation of access for each included function. Non-Radio Links retain their applicable aircraft and product obligations rather than being forced into a radio-spectrum classification.

The FCC final rule published September xx.xx 2026 is scheduled to take effect October xx.xx 2026. It restricts new authorization of specified devices incorporating logic-bearing hardware from relevant Covered List entities. ■■ ■■ ■■■ ■ ■■■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■ ■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■ ■ ■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■

Sources & Evidence

1. Part 107 Waivers
   · The FAA provides a Part xx.xx waiver route for operations beyond visual line of sight; equipment availability does not itself provide that permission. ([faa.gov](https://www.faa.gov/uas/commercial_operators/part_107_waivers))
2. Operational Authorisation
   · EASA requires operational authorization for the specific category, except where a standard scenario or appropriate LUC privileges apply. ([easa.europa.eu](https://www.easa.europa.eu/en/domains/drones-air-mobility/operating-drone/specific-category-civil-drones/operational-authorisation))
3. Spectrum policy
   · Australia distinguishes class-authorized equipment from individually authorized alternatives and makes cellular suitability dependent on network admission and coverage. ([drones.gov.au](https://www.drones.gov.au/policies-and-programs/policies/spectrum-policy))
4. Statement: Spectrum for Unmanned Aircraft Systems (UAS)
   · Ofcom separates radio authorization from aviation requirements and retains existing radio exemptions alongside its UAS operator licensing framework. ([ofcom.org.uk](https://www.ofcom.org.uk/spectrum/radio-equipment/spectrum-for-unmanned-aircraft-systems))
5. Spectrum Rules and Policies for the Operation of Unmanned Aircraft Systems
   · The FCC limits communications under its dedicated non-networked UAS access framework to control and non-payload purposes. ([federalregister.gov](https://www.federalregister.gov/documents/2025/xx.xx/xx.xx/2024-xx.xx/spectrum-rules-and-policies-for-the-operation-of-unmanned-aircraft-systems))
6. Protecting Against National Security Threats to the Communications Supply Chain Through the Equipment Authorization Program
   · The FCC final rule is effective October xx.xx 2026, addresses specified Covered List entities' logic-bearing hardware, and does not revoke previously authorized equipment under this new prohibition. ([federalregister.gov](https://www.federalregister.gov/documents/2026/xx.xx/xx.xx/2026-xx.xx/protecting-against-national-security-threats-to-the-communications-supply-chain-through-the))

5.7. ESG & Sustainability Analysis

For drone-data-link equipment, a commercially actionable environmental consideration is avoidable replacement rather than an assumed benefit from the drone's mission. Elsight describes software updates that can extend capabilities without replacing hardware, whereas DJI documents only partial accessory compatibility between O4 and O3. ■■■■■■ ■■■ ■■■■■ ■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■ ■■■ ■■

RESEARCH SAMPLE REPORT

[redacted]

End-of-life responsibility is consequential for covered equipment supplied into the EU. The WEEE framework requires separate collection and proper treatment and promotes reuse and resource recovery. [redacted]

The social and governance exposure arises from the information carried by inspection and public-safety links. [redacted] Approval of new data uses or a change in hosting counterparty should trigger a renewed governance review before deployment.

Sources & Evidence

1. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
   · Elsight describes software updates that can extend capabilities without hardware replacement; this is not evidence of a comparative environmental benefit.
   ([elsight.com](https://www.elsight.com/products/halo-for-commercial-use/))
2. Drones (UAS)
   · EASA identifies specific-category operator duties concerning privacy, unauthorized access and maintenance, supporting lifecycle and accountability considerations.
   ([easa.europa.eu](https://www.easa.europa.eu/en/the-agency/faqs/drones-uas))
3. DJI O4 Air Unit Series - FAQ
   · Partial compatibility across O4 and O3 accessories supports conditional consideration of replacement consequences. ([dji.com](https://www.dji.com/o4-air-unit/faq))
4. Waste from Electrical and Electronic Equipment (WEEE)
   · The European Commission identifies separate collection and proper treatment obligations for covered electrical and electronic waste, together with reuse and resource-recovery objectives.
   ([environment.ec.europa.eu](https://environment.ec.europa.eu/topics/waste-and-recycling/waste-electrical-and-electronic-equipment-weee_en))
5. Privacy policy
   · Australia's drone privacy guidance identifies jurisdiction-dependent privacy and surveillance obligations and a route for complaints concerning personal-information misuse.
   ([drones.gov.au](https://www.drones.gov.au/drone-rules/privacy-policy))

5.8. Disruption & Risk Scenarios

An access-policy scenario is triggered when a proposed U.S. offering becomes subject to an authorization restriction or a different applicable import treatment. The FCC's scheduled component rule and the August xx.xx 2026 UAS proclamation govern different commercial questions. [redacted]

An infrastructure-disruption scenario exposes response organizations and service operators relying on continuing external connectivity. NIST documents emergency settings with degraded or destroyed communications, while Australian policy distinguishes available equipment from admitted, adequately covered network service.

An ownership-transition scenario arises when the business responsible for management or maintenance changes counterparties. Immediate switching on accounting classification alone can introduce avoidable migration exposure, while relying on the original brand without contractual continuity leaves responsibility uncertain.

A buyer should obtain necessary permissions and supported continuity before accepting the change, rather than infer portability from a common technology category. Retaining the existing arrangement is appropriate only while its rights and support remain valid; a replacement route requires its own compatible, authorized and contractually supported scope.

Sources & Evidence

1. Drones (UAS)
   - A changed communications arrangement must preserve the requirements of the applicable authorized aircraft configuration. ([easa.europa.eu](https://www.easa.europa.eu/en/the-agency/faqs/drones-uas))
2. Spectrum policy
   - Equipment capability does not guarantee carrier admission or incident-area service availability. ([drones.gov.au](https://www.drones.gov.au/policies-and-programs/policies/spectrum-policy))

3. Protecting Against National Security Threats to the Communications Supply Chain Through the Equipment Authorization Program
   · Targeted Covered List component and authorization conditions can affect new purchasing access; protections for previously authorized equipment prevent a blanket replacement conclusion. ([federalregister.gov](https://www.federalregister.gov/documents/2026/xx.xx/xx.xx/2026-xx.xx/protecting-against-national-security-threats-to-the-communications-supply-chain-through-the))
4. Adjusting Imports of Unmanned Aircraft Systems and Unmanned Aircraft Systems Components Into the United States
   · The August xx.xx 2026 U.S. proclamation defines differentiated UAS and component tariff treatment, phased implementation and exceptions, requiring product-specific treatment assessment. ([federalregister.gov](https://www.federalregister.gov/documents/2026/xx.xx/xx.xx/2026-xx.xx/adjusting-imports-of-unmanned-aircraft-systems-and-unmanned-aircraft-systems-components-into-the))
5. Read our Terms & Conditions
   · Nontransferable embedded-software rights and purchased-period support make reassignment and renewal consequential contractual events. ([elsight.com](https://www.elsight.com/terms-conditions/))
6. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
   · The documented emergency setting supports an infrastructure-disruption scenario, not an asserted outage frequency or guaranteed alternative. ([nist.gov](https://www.nist.gov/ctl/pscr/research-portfolios/uncrewed-aircraft-systems))
7. Nokia Corporation Report for Q2 and Half Year 2026
   · Nokia's July xx.xx 2026 report classified Enterprise Campus Edge as discontinued operations because reaching a sale agreement was considered highly probable; it did not establish completed transfer or withdrawal. ([nokia.com](https://www.nokia.com/newsroom/nokia-corporation-report-for-q2-and-half-year-2026/))

5.9. Return on Investment & Cost-Benefit Analysis

For an operator's economic buyer, the relevant comparison is the cost and responsibility of delivering the same authorized mission through direct relationships or a managed package. Nokia's acquisition alternatives demonstrate expenditure-timing choices, not universal economic superiority. ■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■ ■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■ ■■ ■■■ ■■■■■■■■■ ■■■ ■■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■ ■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■ ■■■ ■■■■■■

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[illegible] This choice does not relax flight-management obligations. Commitment should follow the recipient's information need, included rights and accountable delivery scope, not supplier claims of realized returns.

Sources & Evidence

1. Nokia extends partner program to accelerate Drones-as-a-Service business in North America
   · Purchase, lease, sharing and flight-hire alternatives change expenditure timing and retained duties; the announcement does not prove superior realized returns. ([nokia.com](https://www.nokia.com/newsroom/nokia-extends-partner-program-to-accelerate-drones-as-a-service-business-in-north-america/))
2. Drones (UAS)
   · Supported replacement flexibility does not independently establish conformity with an existing operational authorization. ([easa.europa.eu](https://www.easa.europa.eu/en/the-agency/faqs/drones-uas))
3. Read our Terms & Conditions
   · Equipment purchasing does not automatically include every connection, integration or continuing support entitlement. ([elsight.com](https://www.elsight.com/terms-conditions/))
4. ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
   · ITU-T F.xx.xx distinguishes stored mission-payload information from real-time delivery and separates payload services from flight-management communications. ([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-F.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items))
5. Gotonomi Completes Successful Flight Trials and Opens Orders
   · Gotonomi's inspection-bundle announcement separately identifies terminal hardware, Videosoft software and its license, and Viasat airtime. ([gotonomi.com](https://gotonomi.com/resources/gotonomi-completes-successful-flight-trials-and-opens-orders/))
6. Unleashing the Power of Swappable Radio Modules (SRM): The Future of Connectivity Is Here.
   · The swappable-radio ecosystem supports conditional equipment-retention analysis within supported configurations, not universal interchangeability. ([uxvtechnologies.com](https://www.uxvtechnologies.com/news/unleashing-the-power-of-swappable-radio-modules-srm-the-future-of-connectivity-is-here))

6. Cumulative Impact of Artificial Intelligence 2026

AI is a documented element of connected-drone supplier strategy, but its presence in a wider mission system should not be confused with a separately established data-link benefit. ■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■ ■■■■■ ■■■■ ■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■ ■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ It supports a commercial use case, not a staffing reduction, reliability guarantee or market-wide adoption conclusion.

Implementation changes the buyer's integration and data-governance requirements. Nokia describes on-premises processing of drone data when its drone offering is combined with campus-network and industrial-edge services. ■■■■ ■■■■■■■■ ■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■ ■■■■ ■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■

Governance and labor conditions remain material to adoption. NIST's voluntary AI risk framework addresses workforce training, human oversight, documented accountability and third-party rights. ■■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■ ■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■ ■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■ ■ ■■■ ■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■

Sources & Evidence

1. Nokia extends partner program to accelerate Drones-as-a-Service business in North America
   · Nokia describes on-premises processing of drone data when its drone offering is combined with its campus-network and industrial-edge offerings. ([nokia.com](https://www.nokia.com/newsroom/nokia-extends-partner-program-to-accelerate-drones-as-a-service-business-in-north-america/))
2. Part 107 Waivers
   · The FAA's operating-waiver framework remains a separate access condition from supplier descriptions of AI-assisted connected-drone capabilities. ([faa.gov](https://www.faa.gov/uas/commercial_operators/part_107_waivers))
3. AI RMF Core
   · NIST's voluntary AI risk framework addresses documented accountability, workforce training, human oversight, third-party rights and lifecycle risk management. ([airc.nist.gov](https://airc.nist.gov/airmf-resources/airmf/xx.xx-sec-core/))

4. Nokia and Motorola Solutions announce drone technology integration for public safety and mission-critical industries

· Nokia and Motorola Solutions announced an AI-assisted connected-drone integration on December xx.xx 2024. The cited Chula Vista CAPE use does not establish deployment of that newly announced combination. ([nokia.com](https://www.nokia.com/newsroom/nokia-and-motorola-solutions-announce-drone-technology-integration-for-public-safety-and-mission-critical-industries/))

7. Drone Data Link System Market, by Offering

[redacted] An aircraft manufacturer purchasing components retains coordination among these contributions. A complete-system buyer should instead require an explicit list of included endpoints, support equipment and acceptance responsibilities, without assuming that the package includes every necessary network service.

Link Management & Transmission Software introduces rights and continuing support obligations that hardware ownership does not resolve. SkyLine illustrates communications management supplied alongside radios. [redacted]

[redacted] Buyers lacking internal supplier-coordination capability can select a supported service package when its agreement names the responsible counterparties and escalation commitments. Buyers with established integration capability may retain more control through separate purchases, accepting the associated coordination burden.

[redacted] Their inclusion does not make a wider aircraft or mission-service contract entirely a data-link purchase. Suppliers and customers should identify the communications deliverables within a bundle before comparing alternatives; unresolved package boundaries can conceal responsibilities rather than demonstrate an additional commercial opportunity.

Figure 7. Global Drone Data Link System Market, by Offering: Market share evolution, 2025-2032

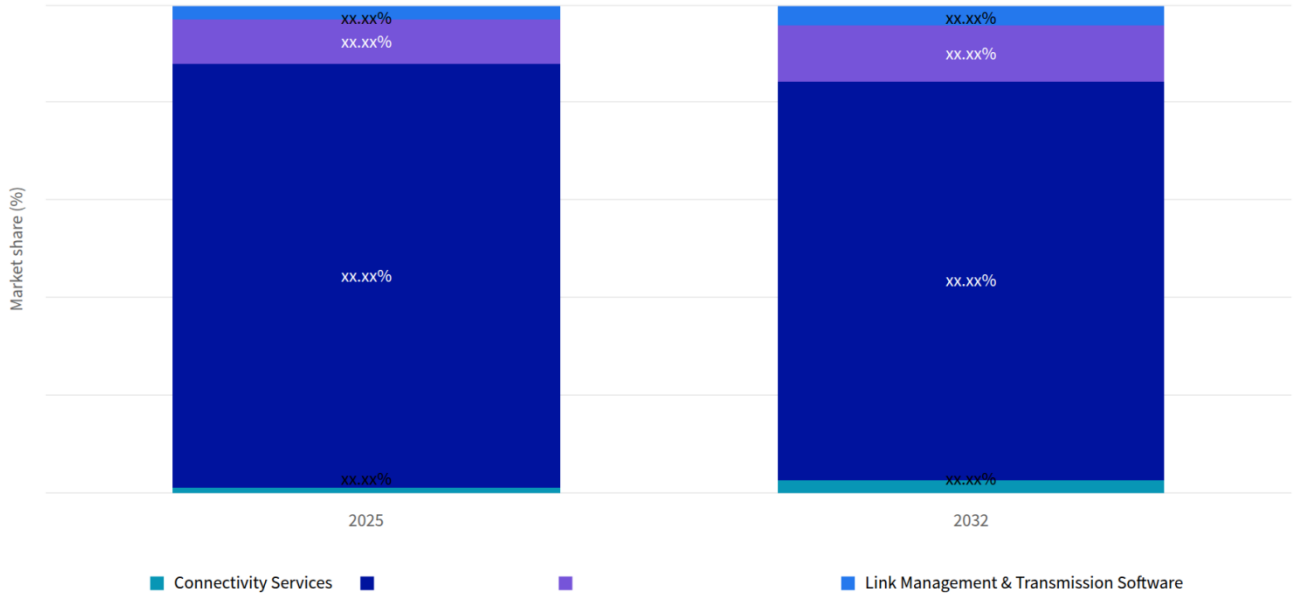

Figure 8. Global Drone Data Link System Market, by Offering: Market size by category, 2025

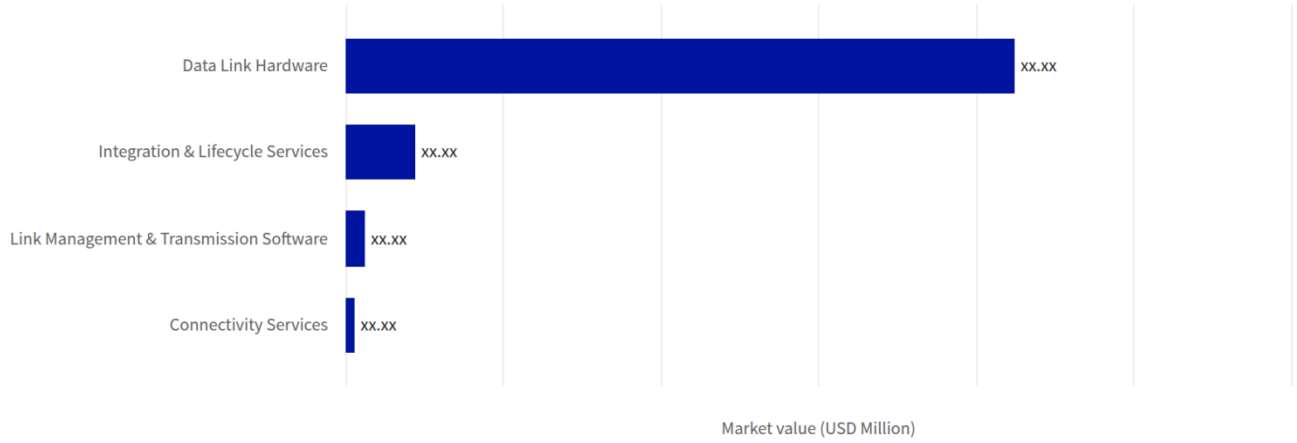

Figure 9. Global Drone Data Link System Market, by Offering: Market size and growth, 2025-2032

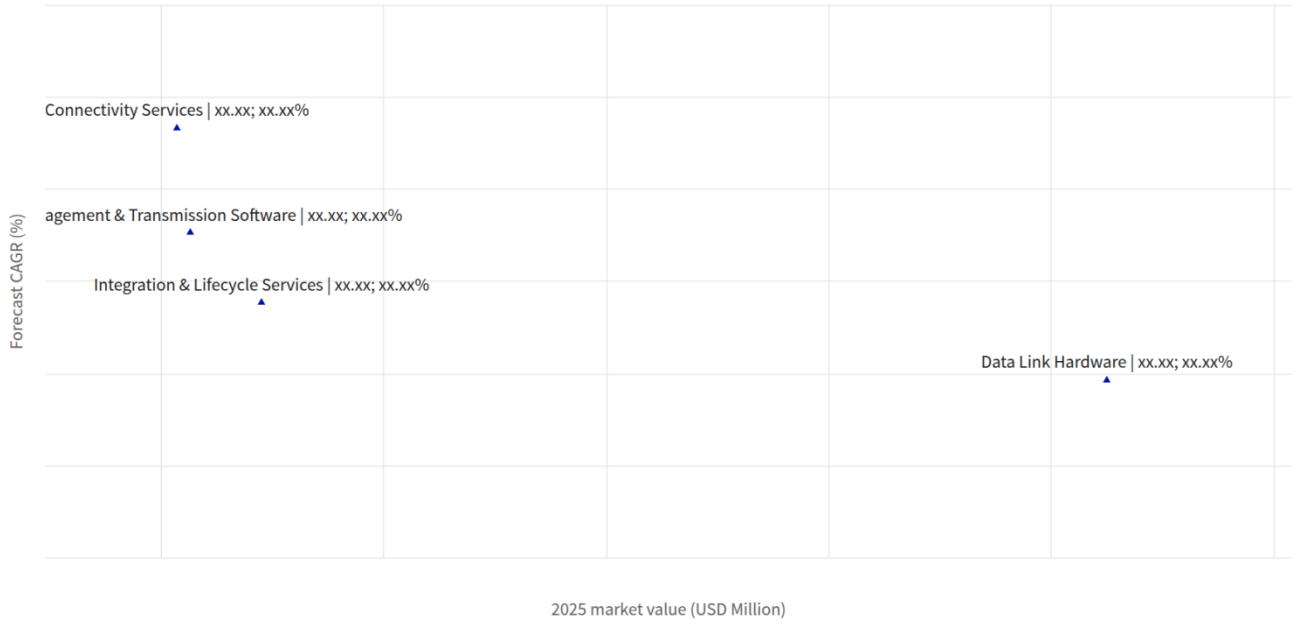

Table 4. Global Drone Data Link System Market, by Offering growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Connectivity Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integration & Lifecycle Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Management & Transmission Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 5. Global Drone Data Link System Market Size, by Offering, 2017-2032 (USD Million)

Offering	2023	2024	2025	2026	2027	2032	CAGR (%)
Connectivity Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integration & Lifecycle Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Management & Transmission Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Velaris - BVLOS connectivity for UAVs

   · Viasat markets Velaris as a dedicated satellite communications service for UAVs and advanced-air-mobility aircraft, establishing a communications-provision role. ([viasat.com](https://www.viasat.com/aviation/advanced-air-mobility/velaris/))

2. Read our Terms & Conditions

   · Elsight's terms establish an embedded-software license, automatic cloud-service renewal, purchased support coverage, and exclusions for third-party integration and unlisted network connections. These support entitlement-specific procurement checks. ([elsight.com](https://www.elsight.com/terms-conditions/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.

3. SkyLine UAS Command & Control - C2 for BVLOS

   · uAvionix identifies paired airborne and ground radios managed through SkyLine, supporting distinct hardware and communications-software deliverables. ([uavionix.com](https://uavionix.com/uncrewed-aircraft-systems/uas-command/))

   · Taxonomy evidence: The commercial UAS offering distinguishes airborne radios, ground radios, and cloud-based communications software, demonstrating different deliverable forms within one drone-link solution. It does not establish the report's complete offering partition. ([uavionix.com](https://uavionix.com/uncrewed-aircraft-systems/uas-command/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.

4. UAV/UGV Products - Advanced Microwave Products

   · Advanced Microwave Products separately catalogs communications transmitters, receivers and transceivers, and supporting RF or microwave amplifiers. ([advmw.com](https://advmw.com/uav-ugv-products/))

5. GORE Tethered Drone Cables for Commercial & Defense

   · Gore markets drone-specific tether cable products for communications and power, establishing a support-component role distinct from complete link systems. ([gore.com](https://www.gore.com/products/tethered-drone-cables-commercial-defense))

6. UAV Data Link and Unmanned Communications - DTC, a Codan Company

   · DTC publicly offers unmanned communications integration and lifecycle support; the offered role does not establish individual contractual responsibility transfer. ([dtccodan.com](https://www.dtccodan.com/solutions/unmanned/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.

7. ISO 21384-3:2026 - Uncrewed aircraft systems - Part 3: Operational procedures
   · Taxonomy evidence: ISO distinguishes the C2-link telecommunications service from a tangible product and defines a provider supplying some or all of that service. This supports treating purchased communications provision separately from purchased equipment. ([iso.org](https://www.iso.org/obp/ui?_escaped_fragment_=iso%3Astd%3Aiso%3A21384%3A-xx.xx%3Aed-xx.xx%3Av1%3Aen))
8. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
9. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
10. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
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   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
12. Telemetry Radios - Holybro Store
   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
13. Motorola Solutions - March 2, 2026 Conference Transcript
   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
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14. Codan FY2025 Results - ASX Announcement, August 21, 2025
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.

15. Codan H1 FY2026 Investor Presentation - February 19, 2026
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
· Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
16. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
17. Elsight Limited - Appendix 4E and Annual Report 2025
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
18. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
19. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
· Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
20. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
· Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

21. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
22. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
23. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
24. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
25. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
26. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced delivery relationship concerns a dedicated satellite communications service; it supports a forecast premise, not realized 2032 revenue.

7.1. Data Link Hardware

Table 6. Global Drone Data Link System Market, by Data Link Hardware growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Complete Data Link Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Terminals & Modules	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Support Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 7. Global Drone Data Link System Market Size, by Data Link Hardware, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 8. Global Drone Data Link System Market Size, by Data Link Hardware, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 9. Global Drone Data Link System Market Size, by Data Link Hardware, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Congressional Record - Senate, February 5, 2024, Pages S356-S357: India MQ-9B Proposed-Sale Notification
   · Taxonomy evidence: The notification distinguishes named communications equipment from broader software, integration, and support elements, supplying a public procurement basis for distinguishing tangible hardware from service deliverables. It is not an exhaustive offering taxonomy. ([congress.gov](https://www.congress.gov/xx.xx/crec/2024/xx.xx/xx.xx/xx.xx/xx.xx/CREC-2024-xx.xx-xx.xx-pt1-PgS356-xx.xx.pdf))
2. SRWG/4 IP/03 - Annex 10 Updates on RPAS C2 Link
   · Taxonomy evidence: The ICAO meeting paper's proposed C2-link provisions distinguish communications equipment from communications-service provision and identify aircraft-side and remote-station communications elements. It is used for category terminology, not as proof of a currently applicable legal requirement. ([icao.int](https://www.icao.int/sites/default/files/APAC/Meetings/2020/2020%20SRWG4/xx.xx-Information%20Papers/IP03_ICAO%20AI.xx.xx%xx.xx-%20Annex%2010%20updates%20on%20RPAS%20C2%20Link.pdf))

3. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
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   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))

15. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
16. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
17. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
18. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
19. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
20. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

21. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

22. Trends in International Arms Transfers, 2025 - SIPRI, March 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

23. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
24. Civil Aviation Safety Authority Annual Report 2024-25
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
25. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
26. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
27. Declaração de Conformidade para Uso Próprio - Anatel
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
28. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))

29. UAV/UGV Products - Advanced Microwave Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
30. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
31. DJI O4 Air Unit Series - FAQ
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.

7.1.1. Complete Data Link Systems

Table 10. Global Drone Data Link System Market Size, by Complete Data Link Systems, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 11. Global Drone Data Link System Market Size, by Complete Data Link Systems, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 12. Global Drone Data Link System Market Size, by Complete Data Link Systems, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. SkyLine UAS Command & Control - C2 for BVLOS

   · Taxonomy evidence: The offering describes paired airborne and ground radios managed as an integrated communications configuration. This supports complete-system identity, while indivisible package pricing remains unestablished. ([uavionix.com](https://uavionix.com/uncrewed-aircraft-systems/uas-command/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.

2. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China

   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
   ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
   ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.

3. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
4. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
5. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
6. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.

7. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
8. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
9. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
10. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
11. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
12. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
13. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))

14. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
15. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
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16. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
17. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
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    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
19. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

20. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
21. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

22. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
23. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
24. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
25. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
26. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
27. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))

7.1.2. Data Link Terminals & Modules

Table 13. Global Drone Data Link System Market Size, by Data Link Terminals & Modules, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 14. Global Drone Data Link System Market Size, by Data Link Terminals & Modules, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 15. Global Drone Data Link System Market Size, by Data Link Terminals & Modules, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Congressional Record - Senate, February 5, 2024, Pages S356-S357: India MQ-9B Proposed-Sale Notification

   · Taxonomy evidence: The February xx.xx 2024 Congressional Record separately names ground data terminals, satellite earth stations, transceivers, and compact data links in the India MQ-9B proposed-sale notification. This independently identifies communications equipment within a wider aircraft package; it does not establish completed delivery or standalone prices.
   ([congress.gov](https://www.congress.gov/xx.xx/crec/2024/xx.xx/xx.xx/xx.xx/xx.xx/CREC-2024-xx.xx-xx.xx-pt1-PgS356-xx.xx.pdf))

2. SRWG/4 IP/03 - Annex 10 Updates on RPAS C2 Link

   · Taxonomy evidence: The proposed provisions identify aircraft and remote-pilot-station transceiver elements within the C2-link system, supporting the endpoint-equipment distinction from the overall communications service.
   ([icao.int](https://www.icao.int/sites/default/files/APAC/Meetings/2020/2020%20SRWG4/xx.xx-Information%20Papers/IP03_ICAO%20AI.xx.xx%xx.xx-%20Annex%2010%20updates%20on%20RPAS%20C2%20Link.pdf))

3. Congressional Record - Senate, February 5, 2024 - India MQ-9B Proposed-Sale Notification

   · Taxonomy evidence: The Congressional Record's MQ-9B proposed-sale notification separately identifies ground data terminals, satellite earth stations, transceivers, and compact data links within the aircraft procurement package. These are recognized communications deliverables; the notification does not establish standalone prices or completed deliveries.
   ([congress.gov](https://www.congress.gov/xx.xx/crec/2024/xx.xx/xx.xx/xx.xx/xx.xx/CREC-2024-xx.xx-xx.xx-senate.pdf))

4. SkyLine UAS Command & Control - C2 for BVLOS
   - Taxonomy evidence: The page separately identifies airborne and ground radio products and provides a purchase route for a ground radio, supporting separately supplied communications endpoints. ([uavionix.com](https://uavionix.com/uncrewed-aircraft-systems/uas-command/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
5. UAV/UGV Products - Advanced Microwave Products
   - Taxonomy evidence: The supplier's UAV/UGV commercial catalog distinguishes communications transmitters, receivers, and transceivers from RF power amplifiers. Only its UAV-attributable offerings support the captured market boundary. ([advmw.com](https://advmw.com/uav-ugv-products/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
6. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.

7. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.

   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

8. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub

   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))

9. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience

   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.

10. Telemetry Radios - Holybro Store
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
11. Motorola Solutions - March 2, 2026 Conference Transcript
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
12. Codan FY2025 Results - ASX Announcement, August 21, 2025
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
13. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
14. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
15. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
16. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

17. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))

18. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
- Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

19. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

20. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

21. Part 107 Waivers - Federal Aviation Administration
- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
- Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

22. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada

- Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))

23. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary

- Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

24. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

25. Trends in International Arms Transfers, 2025 - SIPRI, March 2026

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales.
([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales.
([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

26. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))

27. Civil Aviation Safety Authority Annual Report 2024-25

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals.
([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals.
([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))

28. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled.
([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled.
([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

29. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
30. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
31. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
32. DJI O4 Air Unit Series - FAQ
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.

7.1.3. Link Support Hardware

Table 16. Global Drone Data Link System Market Size, by Link Support Hardware, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 17. Global Drone Data Link System Market Size, by Link Support Hardware, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 18. Global Drone Data Link System Market Size, by Link Support Hardware, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Tethered Drone Cables for Commercial & Defense - Gore

   · Taxonomy evidence: Gore markets drone-specific tether cable assemblies for communications and power, distinguishing data-carrying cable components from complete communications terminals or systems. Only directly attributable communications value falls within the working boundary. ([gore.com](https://www.gore.com/products/tethered-drone-cables-commercial-defense))

2. UAV/UGV Products - Advanced Microwave Products
   - Taxonomy evidence: The catalog markets RF and microwave amplifiers as supporting products for analog and digital transmission sources, establishing a link-support hardware function distinct from the base communications endpoint. ([advmw.com](https://advmw.com/uav-ugv-products/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
3. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.

4. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
5. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
6. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.

7. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
8. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
9. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
10. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
11. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
12. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
13. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

14. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
15. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
16. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
17. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
18. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

19. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
20. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
21. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

22. Trends in International Arms Transfers, 2025 - SIPRI, March 2026

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

23. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))

24. Civil Aviation Safety Authority Annual Report 2024-25

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))

25. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

26. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
27. Declaração de Conformidade para Uso Próprio - Anatel
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes.
([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes.
([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
28. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator.
([faa.gov](https://www.faa.gov/media/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator.
([faa.gov](https://www.faa.gov/media/xx.xx))

7.2. Integration & Lifecycle Services

Table 19. Global Drone Data Link System Market Size, by Integration & Lifecycle Services, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 20. Global Drone Data Link System Market Size, by Integration & Lifecycle Services, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 21. Global Drone Data Link System Market Size, by Integration & Lifecycle Services, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Desider, Issue 199, June 2025 - Next-Generation Armed RPAS Protector Enters Service

   · Taxonomy evidence: The record describes a multiyear Protector support contract. It establishes a sustainment purchase at aircraft-program level but does not disclose the included drone-link share, so it cannot resolve link-specific service allocation. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/685bf0de0433072fce0e1001/desider_-_issue_199__June_2025.pdf))

2. Congressional Record - Senate, February 5, 2024, Pages S356-S357: India MQ-9B Proposed-Sale Notification
   - Taxonomy evidence: Integration, software support, repair, engineering, and logistics are included in the proposed program. Their communications-only commercial value is not separated. ([congress.gov](https://www.congress.gov/xx.xx/crec/2024/xx.xx/xx.xx/xx.xx/xx.xx/CREC-2024-xx.xx-xx.xx-pt1-PgS356-xx.xx.pdf))
3. Congressional Record - Senate, February 5, 2024 - India MQ-9B Proposed-Sale Notification
   - Taxonomy evidence: The proposed procurement includes integration, software support, repair support, and contractor engineering and logistics services alongside communications equipment. The record does not isolate the drone-link share of those broader services. ([congress.gov](https://www.congress.gov/xx.xx/crec/2024/xx.xx/xx.xx/xx.xx/xx.xx/CREC-2024-xx.xx-xx.xx-senate.pdf))
4. UAV Data Link and Unmanned Communications - DTC
   - Taxonomy evidence: DTC's UAV communications offering explicitly includes technical consultation, integration support, deployment support, and long-term lifecycle support. The page establishes offered service functions, not their separately billed revenue. ([dtccodan.com](https://www.dtccodan.com/solutions/unmanned/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
5. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.

6. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
7. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
8. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
9. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.

10. Motorola Solutions - March 2, 2026 Conference Transcript
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
11. Codan FY2025 Results - ASX Announcement, August 21, 2025
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
12. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
13. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
14. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
15. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

16. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))

17. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
- Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

18. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

19. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

20. Part 107 Waivers - Federal Aviation Administration
- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
- Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

21. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada

- Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))

22. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary

- Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

23. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

24. Trends in International Arms Transfers, 2025 - SIPRI, March 2026

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

25. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))

26. Civil Aviation Safety Authority Annual Report 2024-25

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))

27. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

28. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
29. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
30. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
31. Read Our Terms & Conditions - Elsight
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.

7.3. Link Management & Transmission Software

Table 22. Global Drone Data Link System Market Size, by Link Management & Transmission Software, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 23. Global Drone Data Link System Market Size, by Link Management & Transmission Software, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 24. Global Drone Data Link System Market Size, by Link Management & Transmission Software, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. FAA Certificate of Waiver and Authorization 107W-2025-02991 - Pinnacle Drone Light Shows
   · Taxonomy evidence: The record identifies drone-show command-and-control software and its version as part of the documented system. This supports communications-software identity, not an independently purchased entitlement or inclusion of all show-planning software. ([faa.gov](https://www.faa.gov/media/xx.xx))

2. SkyLine UAS Command & Control - C2 for BVLOS

   · Taxonomy evidence: SkyLine is described as cloud-based C2 software providing link routing, monitoring, redundancy, and management of airborne and ground radios. Only its communications functions support this category; adjacent fleet-management and airspace-awareness functions remain outside the working boundary. ([uavionix.com](https://uavionix.com/uncrewed-aircraft-systems/uas-command/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.

3. Conducting Extended BVLOS Operations in Challenging Terrain - Public uAvionix Project Report

   · Taxonomy evidence: The report separately identifies link-management functionality coordinating the integrated communications links, supporting the distinction between bearer hardware and management software. ([faa.gov](https://www.faa.gov/uas/programs_partnerships/BAA/BAA004-uAvionix%E2%xx.xx%93Conducting-Extended-BVLOS-Operations-in-challenging-terrain.pdf))

4. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China

   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
   ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
   ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.

5. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
6. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
7. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
8. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.

9. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
10. Codan FY2025 Results - ASX Announcement, August 21, 2025
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
11. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
12. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
13. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
14. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

15. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
16. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
17. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
18. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
19. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

20. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
21. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
22. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

23. Trends in International Arms Transfers, 2025 - SIPRI, March 2026

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

24. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))

25. Civil Aviation Safety Authority Annual Report 2024-25

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))

26. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

27. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
28. Declaração de Conformidade para Uso Próprio - Anatel
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes.
([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes.
([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
29. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator.
([faa.gov](https://www.faa.gov/media/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator.
([faa.gov](https://www.faa.gov/media/xx.xx))
30. Read Our Terms & Conditions - Elsight
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.

7.4. Connectivity Services

Table 25. Global Drone Data Link System Market Size, by Connectivity Services, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 26. Global Drone Data Link System Market Size, by Connectivity Services, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 27. Global Drone Data Link System Market Size, by Connectivity Services, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. ISO 21384-3:2026 - Uncrewed aircraft systems - Part 3: Operational procedures

   · Taxonomy evidence: The standard defines an external C2-link communications service provider and a service-level agreement between that provider and the UAS operator, establishing a recognized communications-service category. ([iso.org](https://www.iso.org/obp/ui?_escaped_fragment_=iso%3Astd%3Aiso%3A21384%3A-xx.xx%3Aed-xx.xx%3Av1%3Aen))

2. Velaris - Satellite Connectivity for UAVs - Viasat

   · Taxonomy evidence: Viasat markets Velaris as a dedicated satellite communications service for UAVs and advanced-air-mobility aircraft. The UAV-attributable communications service supports this offering category without including unrelated aviation or airspace-management services. ([viasat.com](https://www.viasat.com/aviation/advanced-air-mobility/velaris/))

3. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China

   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.

4. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.

   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

5. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
6. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
7. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
8. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
9. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
10. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
11. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.

12. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
13. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
14. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
15. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
16. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
17. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

18. Part 107 Waivers - Federal Aviation Administration

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.

· Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

19. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))

20. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary

· Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

21. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

22. Trends in International Arms Transfers, 2025 - SIPRI, March 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

23. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
24. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
25. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
26. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
27. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
28. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))

29. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced delivery relationship concerns a dedicated satellite communications service; it supports a forecast premise, not realized 2032 revenue.

8. Drone Data Link System Market, by Connectivity Technology

Connectivity Technology changes the qualified purchasing alternatives and the counterparties on which deployment depends. Within Noncellular Radio Communications, Analog Radio Links and Digital Radio Links remain distinct commercial offerings: Advanced Microwave Products markets analog video equipment and digital data products. ■■■■■■■■ ■■■■■■■ ■ ■■■■■■■ ■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■ ■■■ ■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■ ■■■■■■■ ■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■ ■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■ ■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■

Cellular Communications and Satellite RF Communications add network-service dependencies. Australia's policy makes cellular suitability conditional on network admission and application coverage; Ofcom requires network-operator agreement for mobile and satellite uses under its UAS framework. ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■ ■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■ ■■■ ■■■ ■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■

Wired Electrical Communications and Optical Fiber Communications change the mobility comparison. ■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■ ■■■■■■■■ ■■■■■■■ ■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■ ■■■■■■ ■■■■■ ■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■ ■■ ■ ■■■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ Procurement must identify the data-carrying configuration actually supplied; the presence of a power tether or multiple cable elements does not establish which communications path the buyer receives.

■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■ ■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■ ■■ ■ ■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■ ■■■ ■■■■■ ■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■ ■■ ■■■ ■■■■■■■■■ ■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■ Before a deployment-dependent commitment, the buyer should obtain the named offering, aircraft acceptance and continuing support terms. Historical program evidence

neither proves unrestricted merchant availability nor establishes an absence of commercial activity elsewhere.

Figure 10. Global Drone Data Link System Market, by Connectivity Technology: Market share evolution, 2025-2032

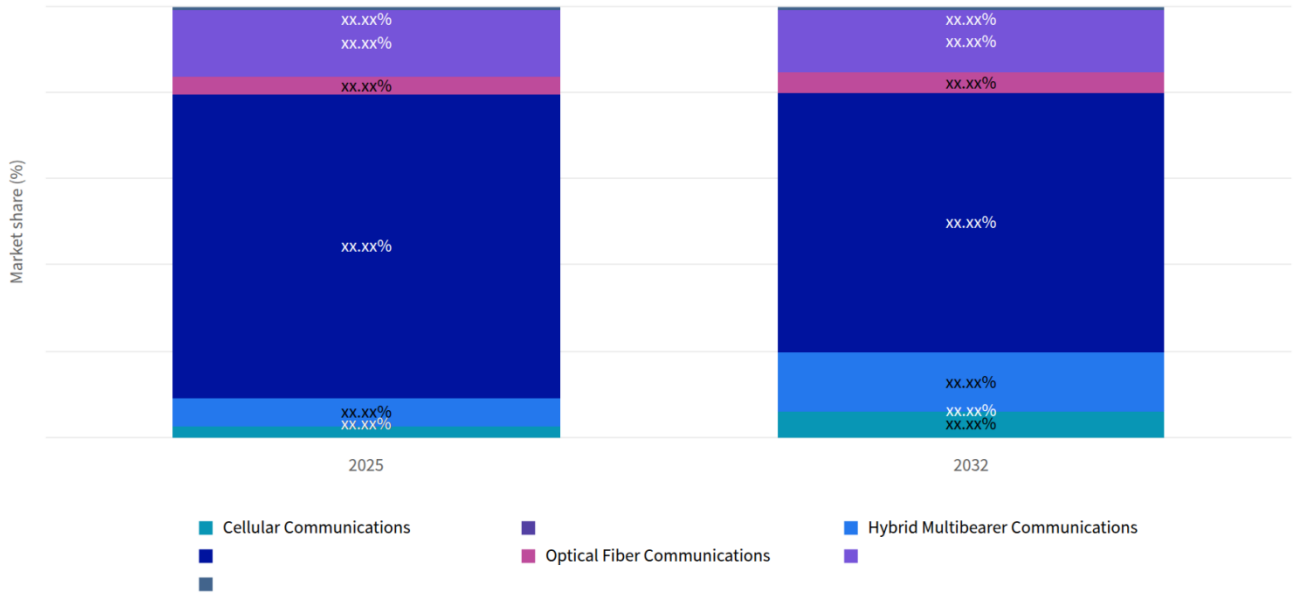

Figure 11. Global Drone Data Link System Market, by Connectivity Technology: Market size by category, 2025

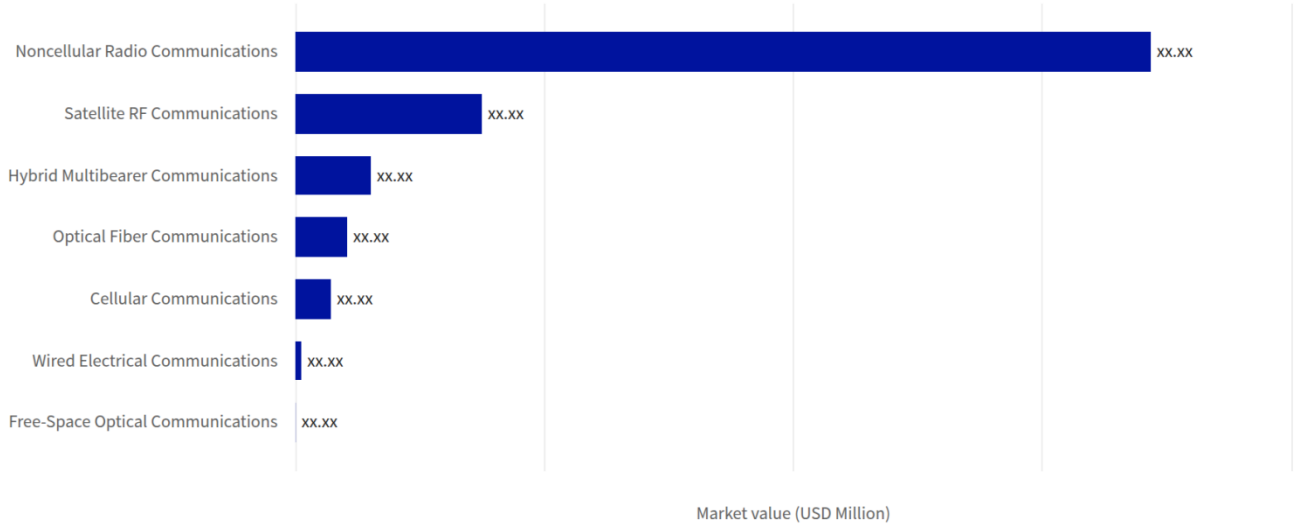

Figure 12. Global Drone Data Link System Market, by Connectivity Technology: Market size and growth, 2025-2032

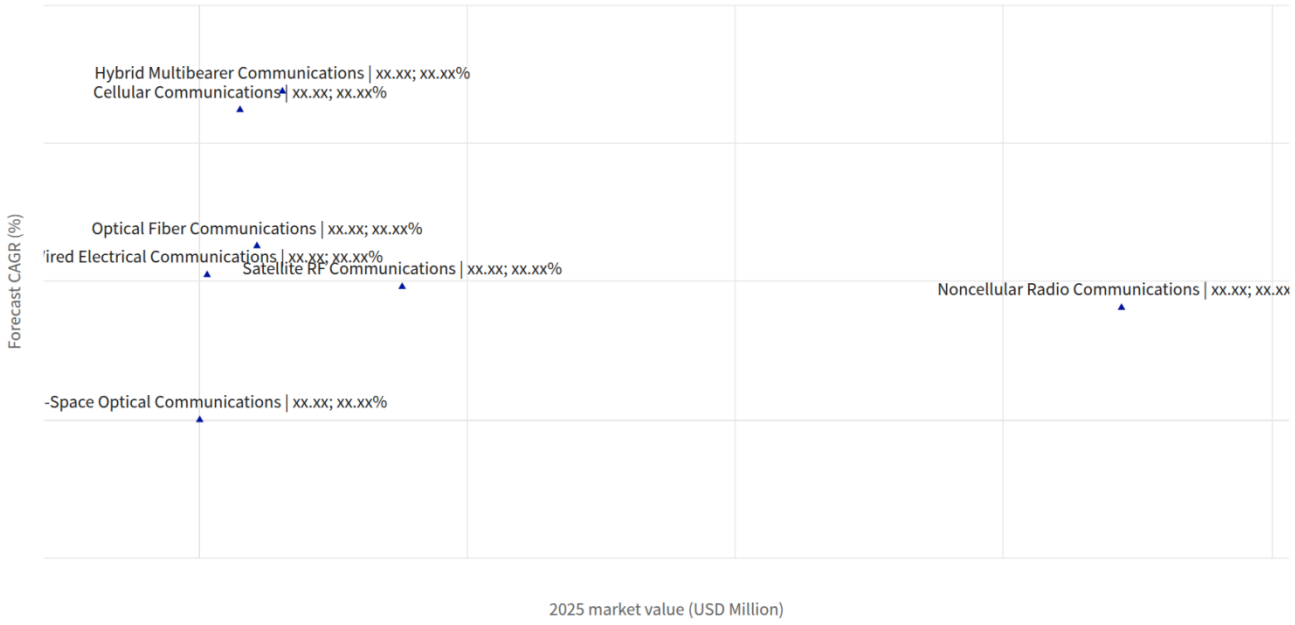

Table 28. Global Drone Data Link System Market, by Connectivity Technology growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Cellular Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Free-Space Optical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Multibearer Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Noncellular Radio Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Optical Fiber Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Satellite RF Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wired Electrical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 29. Global Drone Data Link System Market Size, by Connectivity Technology, 2017-2032 (USD Million)

Connectivity Technology	2023	2024	2025	2026	2027	2032	CAGR (%)
Cellular Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Free-Space Optical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Multibearer Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Noncellular Radio Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Optical Fiber Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Satellite RF Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wired Electrical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
   - Elsight markets Halo as a multibearer offering spanning cellular, satellite and RF relationships; its portfolio is not a buyer-specific continuity agreement. ([elsight.com](https://www.elsight.com/products/halo-for-commercial-use/))
2. Velaris - BVLOS connectivity for UAVs
   - Velaris is delivered through Viasat's satellite network, supporting a network-service relationship rather than equipment ownership alone. ([viasat.com](https://www.viasat.com/aviation/advanced-air-mobility/velaris/))
3. Safe-T Drone Power Station
   - Elistair markets Safe-T xx.xx as a tethered station with an optical-fiber option and requests aircraft-specific compatibility confirmation. Tether mobility suitability is an analytical implication of the ground connection. ([elistair.com](https://elistair.com/solutions/tethering-station-safe-t/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
4. Spectrum policy
   - Australia's policy makes cellular suitability dependent on network authorization and the necessary coverage for the application. This supports conditional bearer selection, not a Global coverage conclusion. ([drones.gov.au](https://www.drones.gov.au/policies-and-programs/policies/spectrum-policy))

5. Statement: Spectrum for Unmanned Aircraft Systems (UAS)
   - Ofcom's UAS operator framework requires specific network-operator agreement for covered mobile and satellite use, separately from aviation requirements. The conclusion is limited to this jurisdictional framework. ([ofcom.org.uk](https://www.ofcom.org.uk/spectrum/radio-equipment/spectrum-for-unmanned-aircraft-systems))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
6. UAV/UGV Products - Advanced Microwave Products
   - Its unmanned-platform portfolio includes analog video and digital data products, supporting separate signaling-family purchases without establishing cross-vendor compatibility. ([advmw.com](https://advmw.com/uav-ugv-products/))
7. GORE Tethered Drone Cables for Commercial & Defense
   - The portfolio distinguishes electrical data and optical-fiber elements; a combined cable does not establish the communications path purchased for a particular deployment. ([gore.com](https://www.gore.com/products/tethered-drone-cables-commercial-defense))
8. Aquila20 FPV Kit - BETAFPV
   - The Aquila20 kit identifies analog video transmission and ExpressLRS control, supporting function-specific identification within a combined offering. ([betafpv.com](https://betafpv.com/products/aquila20-fpv-kit))
9. Quantum Technologies are Changing the Face of Unmanned Aircraft Communications - NASA
   - NASA's January xx.xx 2020 account describes an optical communications research application intended for unmanned aircraft, using hardware flown on a Twin Otter research aircraft. It does not establish a merchant drone offering. ([nasa.gov](https://www.nasa.gov/aeronautics/quantum-technologies-are-changing-the-face-of-unmanned-aircraft-communications/))
10. Mynaric AG Form 20-F for the Year Ended December 31, 2021
    - Mynaric's 2021 annual filing identifies HAWK as an airborne optical product with UAV use cases and early customer programs. These historical business facts do not establish current buyer-specific commercial availability. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/d310942d20f.htm))
11. Instructions for the Certificate of Waiver or Authorization - FAA
    - Taxonomy evidence: The FAA's operator application guidance lists Wi-Fi, radio, satellite, Bluetooth, and cellular-network links as C2-link types. This provides independent regulatory recognition of bearer distinctions without defining market shares or an exhaustive commercial taxonomy. ([faa.gov](https://www.faa.gov/uas/advanced_operations/instructions-drone-operators-completing-faa-form-xx.xx-xx.xx))
12. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.

13. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
- Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
- Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.

14. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.

15. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.

16. Telemetry Radios - Holybro Store
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.

17. Motorola Solutions - March 2, 2026 Conference Transcript
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
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- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.

18. Codan FY2025 Results - ASX Announcement, August 21, 2025
- Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.

19. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
20. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
21. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
22. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
23. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
24. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

25. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
26. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
27. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
28. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
29. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
30. Transformation of the Defence Forces: How Ukraine Changed Its System - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
31. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.

32. Safe-T 2 - Advanced Tethering System Brochure
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
33. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
34. Mynaric AG - Annual Report 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
35. General Atomics and Kepler Communications Successfully Demonstrate Air-to-Space Optical Communications Capability
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.

8.1. Noncellular Radio Communications

Table 30. Global Drone Data Link System Market, by Noncellular Radio Communications growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Analog Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Analog & Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 31. Global Drone Data Link System Market Size, by Noncellular Radio Communications, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 32. Global Drone Data Link System Market Size, by Noncellular Radio Communications, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 33. Global Drone Data Link System Market Size, by Noncellular Radio Communications, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Instructions for the Certificate of Waiver or Authorization - FAA

   · Taxonomy evidence: Wi-Fi, radio, and Bluetooth are explicitly recognized C2-link types, supporting the noncellular-radio grouping when cellular and satellite access are excluded. ([faa.gov](https://www.faa.gov/uas/advanced_operations/instructions-drone-operators-completing-faa-form-xx.xx-xx.xx))

2. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
   ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
   ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
3. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares.
   ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
9. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
10. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
11. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
12. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

13. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
14. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
15. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
16. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
17. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

18. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
19. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
20. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

21. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
22. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
23. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
24. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

25. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
26. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
27. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
28. Transformation of the Defence Forces: How Ukraine Changed Its System - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
29. UAV/UGV Products - Advanced Microwave Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
30. Aquila20 FPV Kit - BETAFPV
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.

8.1.1. Digital Radio Links

Table 34. Global Drone Data Link System Market Size, by Digital Radio Links, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 35. Global Drone Data Link System Market Size, by Digital Radio Links, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 36. Global Drone Data Link System Market Size, by Digital Radio Links, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Congressional Record - Senate, February 5, 2024 - India MQ-9B Proposed-Sale Notification

   · Taxonomy evidence: The same named compact data link supports digital waveforms and interoperates with digital tactical communications equipment. Capability does not determine the configuration actually deployed. ([congress.gov](https://www.congress.gov/xx.xx/crec/2024/xx.xx/xx.xx/xx.xx/xx.xx/CREC-2024-xx.xx-xx.xx-senate.pdf))

2. UAV/UGV Products - Advanced Microwave Products

   · Taxonomy evidence: The same catalog identifies digital data transceivers for telemetry and control communications, supporting digital noncellular radio as a distinct signaling family. ([advmw.com](https://advmw.com/uav-ugv-products/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.

3. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
4. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

5. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
6. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
7. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
8. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
9. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.

10. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
11. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
12. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
13. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
14. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
15. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
16. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

17. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results

· Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.

· Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

18. Part 107 Waivers - Federal Aviation Administration

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.

· Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

19. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))

20. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary

· Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

21. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
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- Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

22. Trends in International Arms Transfers, 2025 - SIPRI, March 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

23. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
24. Civil Aviation Safety Authority Annual Report 2024-25
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
25. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
26. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
27. Declaração de Conformidade para Uso Próprio - Anatel
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
28. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))

8.1.2. Combined Analog & Digital Radio Links

Table 37. Global Drone Data Link System Market Size, by Combined Analog & Digital Radio Links, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 38. Global Drone Data Link System Market Size, by Combined Analog & Digital Radio Links, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 39. Global Drone Data Link System Market Size, by Combined Analog & Digital Radio Links, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Aquila20 FPV Kit - BETAFPV

   · Taxonomy evidence: The analog Aquila20 commercial aircraft kit identifies analog video transmission together with ExpressLRS remote-control connectivity. This supports identification of an embedded mixed-signaling configuration; it does not establish a separately priced communications subsystem or bring the whole aircraft into scope. ([betafpv.com](https://betafpv.com/products/aquila20-fpv-kit))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.

2. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
3. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

4. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
5. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
6. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
7. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
8. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
9. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
10. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.

11. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
12. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
13. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
14. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
15. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
16. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
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    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

18. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
19. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
20. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

21. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
22. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
23. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
24. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

25. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
26. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
27. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))

8.1.3. Analog Radio Links

Table 40. Global Drone Data Link System Market Size, by Analog Radio Links, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 41. Global Drone Data Link System Market Size, by Analog Radio Links, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 42. Global Drone Data Link System Market Size, by Analog Radio Links, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Congressional Record - Senate, February 5, 2024 - India MQ-9B Proposed-Sale Notification
   · Taxonomy evidence: The notification describes a compact multiband data link supporting analog waveforms, independently establishing analog signaling within a named UAV communications category. ([congress.gov](https://www.congress.gov/xx.xx/crec/2024/xx.xx/xx.xx/xx.xx/xx.xx/CREC-2024-xx.xx-xx.xx-senate.pdf))

2. UAV/UGV Products - Advanced Microwave Products
   - Taxonomy evidence: The catalog explicitly markets analog FM video transmitters and receivers in its unmanned-platform offering. ([advmw.com](https://advmw.com/uav-ugv-products/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
3. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.

4. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
5. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
6. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
7. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.

8. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
9. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
10. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
11. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
12. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
13. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
14. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))

15. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
16. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
17. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
18. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
19. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
20. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

21. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

22. Trends in International Arms Transfers, 2025 - SIPRI, March 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

23. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
24. Civil Aviation Safety Authority Annual Report 2024-25
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
25. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
26. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
27. Declaração de Conformidade para Uso Próprio - Anatel
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
28. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))

8.2. Satellite RF Communications

Table 43. Global Drone Data Link System Market Size, by Satellite RF Communications, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 44. Global Drone Data Link System Market Size, by Satellite RF Communications, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 45. Global Drone Data Link System Market Size, by Satellite RF Communications, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Instructions for the Certificate of Waiver or Authorization - FAA
   - Taxonomy evidence: Satellite connectivity is explicitly identified as a C2-link type. ([faa.gov](https://www.faa.gov/uas/advanced_operations/instructions-drone-operators-completing-faa-form-xx.xx-xx.xx))
2. Velaris - Satellite Connectivity for UAVs - Viasat
   - Taxonomy evidence: The offering identifies satellite-network delivery of the UAV data link, corroborating satellite RF access as a commercial connectivity family. ([viasat.com](https://www.viasat.com/aviation/advanced-air-mobility/velaris/))

3. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
4. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

5. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
6. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
7. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
8. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
9. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
10. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
11. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.

12. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
13. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
14. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
15. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
16. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
17. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
18. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

19. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
20. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
21. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

22. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
23. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
24. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
25. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

26. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
27. Declaração de Conformidade para Uso Próprio - Anatel
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes.
([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes.
([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
28. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator.
([faa.gov](https://www.faa.gov/media/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator.
([faa.gov](https://www.faa.gov/media/xx.xx))
29. Statement: Spectrum for Unmanned Aircraft Systems - Ofcom
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.

8.3. Hybrid Multibearer Communications

Table 46. Global Drone Data Link System Market Size, by Hybrid Multibearer Communications, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 47. Global Drone Data Link System Market Size, by Hybrid Multibearer Communications, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 48. Global Drone Data Link System Market Size, by Hybrid Multibearer Communications, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Conducting Extended BVLOS Operations in Challenging Terrain - Public uAvionix Project Report
   · Taxonomy evidence: The FAA-hosted public project report documents integration of cellular, noncellular C-band radio, and satellite communications into a unified UAV C2 link. It establishes a multibearer configuration, not commercial sales or universal performance. ([faa.gov](https://www.faa.gov/uas/programs_partnerships/BAA/BAA004-uAvionix%E2%xx.xx%93Conducting-Extended-BVLOS-Operations-in-challenging-terrain.pdf))

2. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
3. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

4. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
5. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
6. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
7. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
8. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
9. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
10. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.

11. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
12. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
13. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
14. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
15. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
16. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

17. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
18. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
19. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

20. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
21. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

22. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
23. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
24. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
25. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
26. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
27. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))

28. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.

8.4. Optical Fiber Communications

Table 49. Global Drone Data Link System Market Size, by Optical Fiber Communications, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 50. Global Drone Data Link System Market Size, by Optical Fiber Communications, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 51. Global Drone Data Link System Market Size, by Optical Fiber Communications, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Utilizing Telecommunications/ICTs for Disaster Risk Reduction and Management - ITU-D Question 5/2

   · Taxonomy evidence: The ITU report identifies tethered UAV equipment communicating with ground equipment through the tether's optical-fiber data path. This independently establishes guided optical communication in an aircraft-external link context. ([itu.int](https://www.itu.int/dms_pub/itu-d/opb/stg/D-STG-SG02.xx.xx-2021-PDF-E.pdf))

2. Safe-T 2 - Advanced Tethering System Brochure

   · Taxonomy evidence: The same commercial brochure identifies an optional optical-fiber communications configuration, supporting separate guided-optical and electrical communications categories. ([elistair.com](https://elistair.com/wp-content/uploads/2021/xx.xx/Safe-T_2_-_Leaflet.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.

3. Tethered Drone Cables for Commercial & Defense - Gore

   · Taxonomy evidence: The page explicitly identifies optical fiber within its drone-tether communications offering. A combined cable does not establish that every available data path is used in a particular purchased configuration. ([gore.com](https://www.gore.com/products/tethered-drone-cables-commercial-defense))

4. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
5. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
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   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
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6. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
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   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
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   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
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   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
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    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
11. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
12. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.

13. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
14. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
15. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
16. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
17. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
18. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
19. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

20. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
21. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
22. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

23. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
24. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
25. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
26. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

27. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
28. Declaração de Conformidade para Uso Próprio - Anatel
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes.
([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes.
([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
29. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator.
([faa.gov](https://www.faa.gov/media/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator.
([faa.gov](https://www.faa.gov/media/xx.xx))
30. Transformation of the Defence Forces: How Ukraine Changed Its System - Ministry of Defence of Ukraine
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
31. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
32. Safe-T Drone Power Station - Elistair
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.

8.5. Cellular Communications

Table 52. Global Drone Data Link System Market Size, by Cellular Communications, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 53. Global Drone Data Link System Market Size, by Cellular Communications, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 54. Global Drone Data Link System Market Size, by Cellular Communications, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. ETSI TS 122 125 V19.2.0 (2026-01): Unmanned Aerial System Support in 3GPP

   · Taxonomy evidence: The January 2026 specification covers UAV communications through 3GPP systems and identifies cellular access nodes carried by UAVs. Cellular bearer identity therefore need not imply a ground-based access node or public-network ownership. This post-base-year standard is category evidence, not 2025 sales evidence.
   ([etsi.org](https://www.etsi.org/deliver/etsi_ts/122100_122199/xx.xx/xx.xx.00_60/ts_122125v190200p.pdf))

   · Taxonomy evidence: The standard addresses 3GPP provision of UAV-controller communications and recognizes direct and network-assisted C2 communication. It also identifies cellular access nodes carried onboard UAVs, supporting cellular classification without equating it to terrestrial network ownership.
   ([etsi.org](https://www.etsi.org/deliver/etsi_ts/122100_122199/xx.xx/xx.xx.00_60/ts_122125v190200p.pdf))

2. Instructions for the Certificate of Waiver or Authorization - FAA

   · Taxonomy evidence: Cellular-network connectivity is explicitly identified as a C2-link type.
   ([faa.gov](https://www.faa.gov/uas/advanced_operations/instructions-drone-operators-completing-faa-form-xx.xx-xx.xx))

3. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
4. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

5. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
6. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
7. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
8. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
9. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
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    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.

12. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
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14. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
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    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
15. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
16. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
17. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
18. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

19. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
20. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
21. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

22. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
23. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
24. Civil Aviation Safety Authority Annual Report 2024-25
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
25. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

26. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
27. Declaração de Conformidade para Uso Próprio - Anatel
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes.
([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes.
([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
28. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator.
([faa.gov](https://www.faa.gov/media/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator.
([faa.gov](https://www.faa.gov/media/xx.xx))
29. Statement: Spectrum for Unmanned Aircraft Systems - Ofcom
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.

8.6. Wired Electrical Communications

Table 55. Global Drone Data Link System Market Size, by Wired Electrical Communications, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 56. Global Drone Data Link System Market Size, by Wired Electrical Communications, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 57. Global Drone Data Link System Market Size, by Wired Electrical Communications, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Safe-T 2 - Advanced Tethering System Brochure

   · Taxonomy evidence: The supplier's Safe-T xx.xx brochure identifies broadband-over-power-line communications within the drone tether offering. This supports an electrical data-bearing tether category rather than treating every tether as optical or power-only. Current configuration continuity across revisions is not established. ([elistair.com](https://elistair.com/wp-content/uploads/2021/xx.xx/Safe-T_2_-_Leaflet.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.

2. Tethered Drone Cables for Commercial & Defense - Gore

   · Taxonomy evidence: The commercial drone-cable page distinguishes an electrical data pair from a power pair and an optical-fiber element, supporting electrical data transport as a recognized component function. ([gore.com](https://www.gore.com/products/tethered-drone-cables-commercial-defense))

3. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China

   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.

4. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
5. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
6. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
7. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.

8. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
9. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
10. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
11. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
12. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
13. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
14. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))

15. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
16. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
17. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
18. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
19. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
20. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

21. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

22. Trends in International Arms Transfers, 2025 - SIPRI, March 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

23. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
24. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
25. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
26. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
27. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
28. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))

8.7. Free-Space Optical Communications

Table 58. Global Drone Data Link System Market Size, by Free-Space Optical Communications, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 59. Global Drone Data Link System Market Size, by Free-Space Optical Communications, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 60. Global Drone Data Link System Market Size, by Free-Space Optical Communications, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Quantum Technologies Are Changing the Face of Unmanned Aircraft Communications - NASA

   · Taxonomy evidence: NASA's January xx.xx 2020 account identifies an optical data channel in research intended for unmanned-aircraft applications, with hardware flown on a Twin Otter research aircraft. It supports the named optical technology but is not evidence of merchant availability or a commercial deployment on an unmanned aircraft. ([nasa.gov](https://www.nasa.gov/aeronautics/quantum-technologies-are-changing-the-face-of-unmanned-aircraft-communications/))

   · Taxonomy evidence: NASA identifies an optical data-communications channel in research intended for unmanned-aircraft applications. The account establishes the named technology category while describing research and flight demonstrations, not commercial drone-link availability. ([nasa.gov](https://www.nasa.gov/aeronautics/quantum-technologies-are-changing-the-face-of-unmanned-aircraft-communications/))

2. HAWK - Optical Communication Terminal for Airborne and Ground Operations

   · Taxonomy evidence: Mynaric identifies HAWK as an optical communications terminal with UAS applications, but explicitly describes its status as an early-generation product for demonstrations and use-case verification. The page does not establish unrestricted current drone-market sales. ([mynaric.com](https://mynaric.com/products/hawk))

   · Taxonomy evidence: The page distinguishes optical client-data transmission from an additional radio connection required by the described version. Optical classification therefore does not imply the complete absence of ancillary RF connectivity. ([mynaric.com](https://mynaric.com/products/hawk))

3. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
4. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

5. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
6. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
7. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
8. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
9. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
10. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
11. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.

12. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
13. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
14. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
15. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
16. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
17. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
18. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

19. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
20. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
21. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

22. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
23. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
24. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
25. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

26. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
27. Declaração de Conformidade para Uso Próprio - Anatel
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes.
([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes.
([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
28. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator.
([faa.gov](https://www.faa.gov/media/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator.
([faa.gov](https://www.faa.gov/media/xx.xx))
29. Mynaric AG - Annual Report 2023
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
30. General Atomics and Kepler Communications Successfully Demonstrate Air-to-Space Optical Communications Capability
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.

9. Drone Data Link System Market, by Network Topology

[illegible] For the latter, procurement should identify ownership and support of the common infrastructure because several aircraft relationships can depend on it. The commercial advantage of centralized coordination must be weighed against that shared dependency.

Decentralized Multipoint Networks distribute communications relationships among participating nodes, but do not eliminate supplier or management obligations. Commercial mesh capability establishes an available architecture, not automatic compatibility with another vendor's installed network. [illegible]

[illegible] For a composite deployment, the buyer should require one documented commercial scope covering the constituent arrangements and their interfaces. Public architecture descriptions do not establish supplier responsibility for a particular combined deployment; separate purchases preserve choice but can leave interface accountability unresolved.

Figure 13. Global Drone Data Link System Market, by Network Topology: Market share evolution, 2025-2032

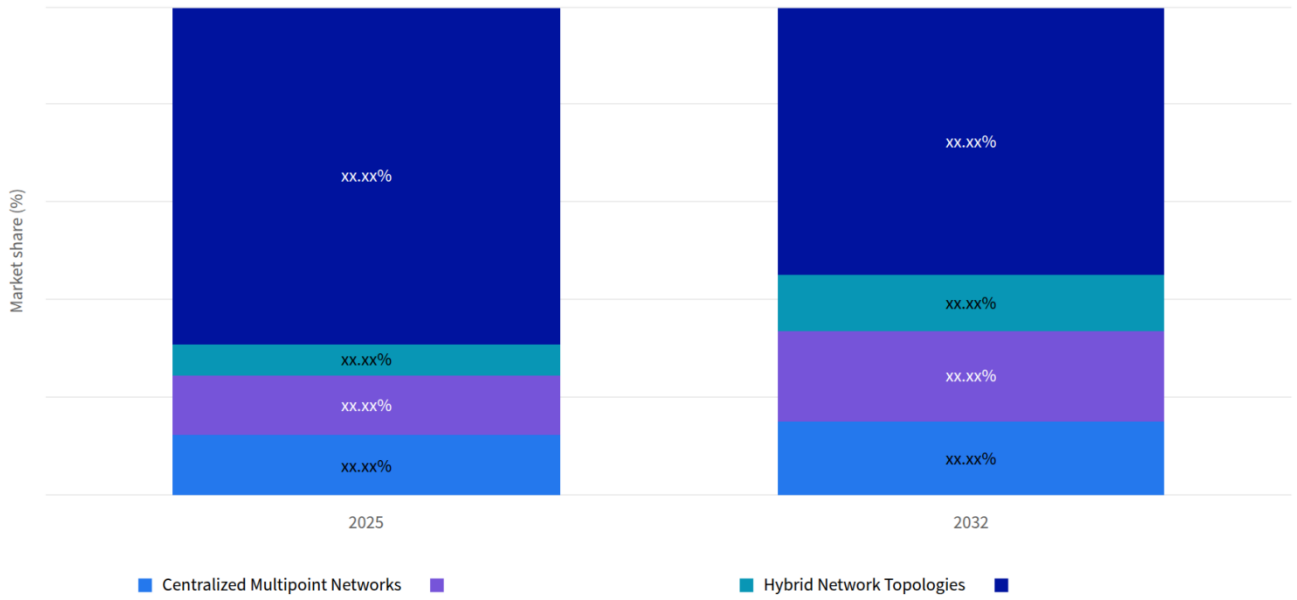

Figure 14. Global Drone Data Link System Market, by Network Topology: Market size by category, 2025

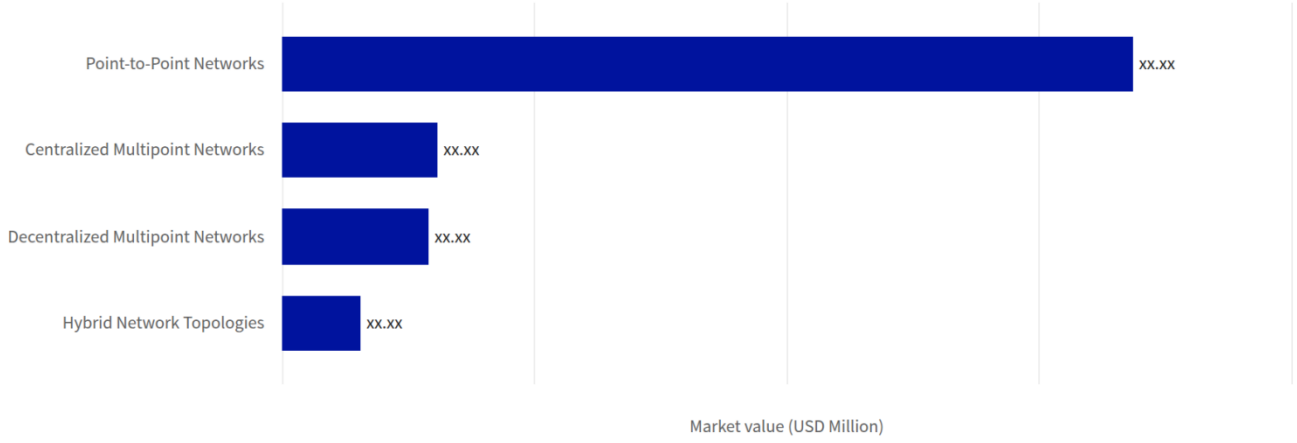

Figure 15. Global Drone Data Link System Market, by Network Topology: Market size and growth, 2025-2032

Table 61. Global Drone Data Link System Market, by Network Topology growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Centralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Decentralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Topologies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Point-to-Point Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 62. Global Drone Data Link System Market Size, by Network Topology, 2017-2032 (USD Million)

Network Topology	2023	2024	2025	2026	2027	2032	CAGR (%)
Centralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Decentralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Topologies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Point-to-Point Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. UAV Data Link and Unmanned Communications - DTC, a Codan Company
   - DTC describes its communications family as supporting point-to-point and mesh arrangements. Product capability therefore does not independently identify the arrangement purchased by a customer. ([dtccodan.com](https://www.dtccodan.com/solutions/unmanned/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
2. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
   - NIST distinguishes point-to-point, single-link, multi-UAS and mesh communications settings in its public-safety portfolio. These are demand-side distinctions, not evidence of purchased deployment prevalence. ([nist.gov](https://www.nist.gov/ctl/pscr/research-portfolios/uncrewed-aircraft-systems))
   - Taxonomy evidence: NIST's UAS communications portfolio distinguishes single-link, point-to-point, multi-UAS, relay, and mesh configurations in its public-safety communications work. These are independent demand-side network distinctions, not supplier-specific product names. ([nist.gov](https://www.nist.gov/ctl/pscr/research-portfolios/uncrewed-aircraft-systems))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
3. Review of Unmanned Aerial Vehicle Swarm Communication Architectures and Routing Protocols
   - The peer-reviewed review distinguishes centralized and decentralized UAV communications and describes combined centralized inter-group and decentralized intra-group arrangements. It supports topology differentiation, not supplier-specific commercial commitments. ([mdpi-res.com](https://mdpi-res.com/d_attachment/applsci/applsci-xx.xx-xx.xx/article_deploy/applsci-xx.xx-xx.xx-with-cover.pdf?version=xx.xx))
   - Taxonomy evidence: The peer-reviewed review distinguishes centralized UAV communications through a common infrastructure node from decentralized UAV ad hoc communications. Its architecture descriptions support topology definitions, not market penetration or sales. ([mdpi-res.com](https://mdpi-res.com/d_attachment/applsci/applsci-xx.xx-xx.xx/article_deploy/applsci-xx.xx-xx.xx-with-cover.pdf?version=xx.xx))

4. ETSI TS 122 125 V19.2.0 (2026-01): Unmanned Aerial System Support in 3GPP
   · Taxonomy evidence: Direct and network-assisted C2 relationships, including redundant links, are recognized separately from the underlying transport. Bearer, endpoint topology, and network responsibility consequently remain distinct analytical questions.
   ([etsi.org](https://www.etsi.org/deliver/etsi_ts/122100_122199/xx.xx/xx.xx.00_60/ts_122125v190200p.pdf))
   · Taxonomy evidence: The standard distinguishes the communications transport network from the UAV/controller relationship and allows redundant communications links. This supports keeping bearer and deployed topology as separate classification questions.
   ([etsi.org](https://www.etsi.org/deliver/etsi_ts/122100_122199/xx.xx/xx.xx.00_60/ts_122125v190200p.pdf))
5. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
6. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
7. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
8. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
9. Telemetry Radios - Holybro Store
   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.

10. Motorola Solutions - March 2, 2026 Conference Transcript
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
11. Codan FY2025 Results - ASX Announcement, August 21, 2025
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
12. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
13. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.

14. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
15. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
16. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
17. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
18. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
19. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
20. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
21. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
22. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

9.1. Point-to-Point Networks

Table 63. Global Drone Data Link System Market Size, by Point-to-Point Networks, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 64. Global Drone Data Link System Market Size, by Point-to-Point Networks, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 65. Global Drone Data Link System Market Size, by Point-to-Point Networks, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Uncrewed Aircraft Systems - NIST Public Safety Communications Research

   · Taxonomy evidence: The portfolio explicitly recognizes point-to-point and single-link drone communications configurations. ([nist.gov](https://www.nist.gov/ctl/pscr/research-portfolios/uncrewed-aircraft-systems))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.

2. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
3. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares.
([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares.
([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

4. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
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   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
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   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
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   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
10. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.

11. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
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    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
13. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
14. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
15. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
16. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
17. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

18. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
19. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
20. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

21. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
22. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
23. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
24. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

25. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
26. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
27. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
28. UAV Data Link and Unmanned Communications - DTC, a Codan Company
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.

9.2. Centralized Multipoint Networks

Table 66. Global Drone Data Link System Market Size, by Centralized Multipoint Networks, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 67. Global Drone Data Link System Market Size, by Centralized Multipoint Networks, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 68. Global Drone Data Link System Market Size, by Centralized Multipoint Networks, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. ETSI TR 102 328 V1.1.1 - Multipoint Equipment and Mesh Topology

   · Taxonomy evidence: ETSI identifies a central hub or station in point-to-multipoint networks. This supplies standardized topology terminology; its fixed-radio scope is adapted to UAV networks only alongside UAV-specific evidence.
   ([etsi.org](https://www.etsi.org/deliver/etsi_tr/102300_102399/xx.xx/xx.xx.01_60/tr_102328v010101p.pdf))

2. Review of Unmanned Aerial Vehicle Swarm Communication Architectures and Routing Protocols
   - Taxonomy evidence: The review describes multiple UAVs communicating through a central infrastructure node and separately identifies star arrangements, supporting the hub-mediated multipoint category. ([mdpi-res.com](https://mdpi-res.com/d_attachment/applsci/applsci-xx.xx-xx.xx/article_deploy/applsci-xx.xx-xx.xx-with-cover.pdf?version=xx.xx))
3. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
4. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

5. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
6. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
7. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
8. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
9. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
10. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
11. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.

12. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
13. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
14. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
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    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
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    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
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    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

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    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
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    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
21. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

22. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
23. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
24. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
25. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

26. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
27. Declaração de Conformidade para Uso Próprio - Anatel
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes.
([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes.
([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
28. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator.
([faa.gov](https://www.faa.gov/media/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator.
([faa.gov](https://www.faa.gov/media/xx.xx))
29. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.

9.3. Decentralized Multipoint Networks

Table 69. Global Drone Data Link System Market Size, by Decentralized Multipoint Networks, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 70. Global Drone Data Link System Market Size, by Decentralized Multipoint Networks, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 71. Global Drone Data Link System Market Size, by Decentralized Multipoint Networks, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Uncrewed Aircraft Systems - NIST Public Safety Communications Research

· Taxonomy evidence: The portfolio explicitly recognizes multi-hop mesh behavior and multi-UAS communications, supporting a decentralized multipoint grouping independently of the underlying radio bearer. ([nist.gov](https://www.nist.gov/ctl/pscr/research-portfolios/uncrewed-aircraft-systems))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.

2. ETSI TR 102 328 V1.1.1 - Multipoint Equipment and Mesh Topology

· Taxonomy evidence: ETSI distinguishes multipoint-to-multipoint mesh networks by peer terminal relationships and communications between stations, rather than the radial central-station pattern of point-to-multipoint networks.
([etsi.org](https://www.etsi.org/deliver/etsi_tr/102300_102399/xx.xx/xx.xx.01_60/tr_102328v010101p.pdf))

3. Review of Unmanned Aerial Vehicle Swarm Communication Architectures and Routing Protocols

· Taxonomy evidence: The review identifies ring and mesh intra-UAV communications and peer forwarding, supporting a broader decentralized multipoint category rather than limiting it to one mesh product family. ([mdpi-res.com](https://mdpi-res.com/d_attachment/applsci/applsci-xx.xx-xx.xx/article_deploy/applsci-xx.xx-xx.xx-with-cover.pdf?version=xx.xx))

4. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China

· Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.

5. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
6. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
7. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
8. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.

9. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
10. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
11. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
12. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.

13. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
14. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
15. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
16. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
17. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
18. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
19. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

20. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
21. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
22. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

23. Trends in International Arms Transfers, 2025 - SIPRI, March 2026

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

24. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))

25. Civil Aviation Safety Authority Annual Report 2024-25

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))

26. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

27. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
28. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
29. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
30. UAV Data Link and Unmanned Communications - DTC, a Codan Company
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.

9.4. Hybrid Network Topologies

Table 72. Global Drone Data Link System Market Size, by Hybrid Network Topologies, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 73. Global Drone Data Link System Market Size, by Hybrid Network Topologies, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 74. Global Drone Data Link System Market Size, by Hybrid Network Topologies, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Review of Unmanned Aerial Vehicle Swarm Communication Architectures and Routing Protocols

   · Taxonomy evidence: The review describes multi-group UAV networks combining centralized inter-group communication with ad hoc intra-group networks. This supports the identified composite-topology category, but does not establish a commercial contract for it.
   ([mdpi-res.com](https://mdpi-res.com/d_attachment/applsci/applsci-xx.xx-xx.xx/article_deploy/applsci-xx.xx-xx.xx-with-cover.pdf?version=xx.xx))

2. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
3. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares.
([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares.
([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

4. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
5. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
6. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
7. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
8. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
9. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
10. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.

11. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
12. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
13. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
14. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
15. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
16. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
17. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

18. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
19. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
20. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

21. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
22. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
23. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
24. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

25. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.

26. Declaração de Conformidade para Uso Próprio - Anatel

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes.
([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes.
([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))

27. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator.
([faa.gov](https://www.faa.gov/media/xx.xx))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator.
([faa.gov](https://www.faa.gov/media/xx.xx))

10. Drone Data Link System Market, by Link Function

Link Function separates the communications needed to manage an aircraft from the information purchased for its mission. ITU distinguishes flight-control and flight-data communications from mission-payload services. ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■ ■■■ ■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■ ■■■■ ■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■■ ■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■ ■■■■ ■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■ ■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■

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Payload purchasing also differs according to when the information is needed. ITU recognizes both stored mission data and real-time payload communications, while Elsight markets video, telemetry and sensor-data delivery within one platform. ■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■ ■ ■■■■ ■■■■■■■■ ■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■ ■■■■ ■■■■■■ ■■■■■■ ■■■ ■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■

Figure 16. Global Drone Data Link System Market, by Link Function: Market share evolution, 2025-2032

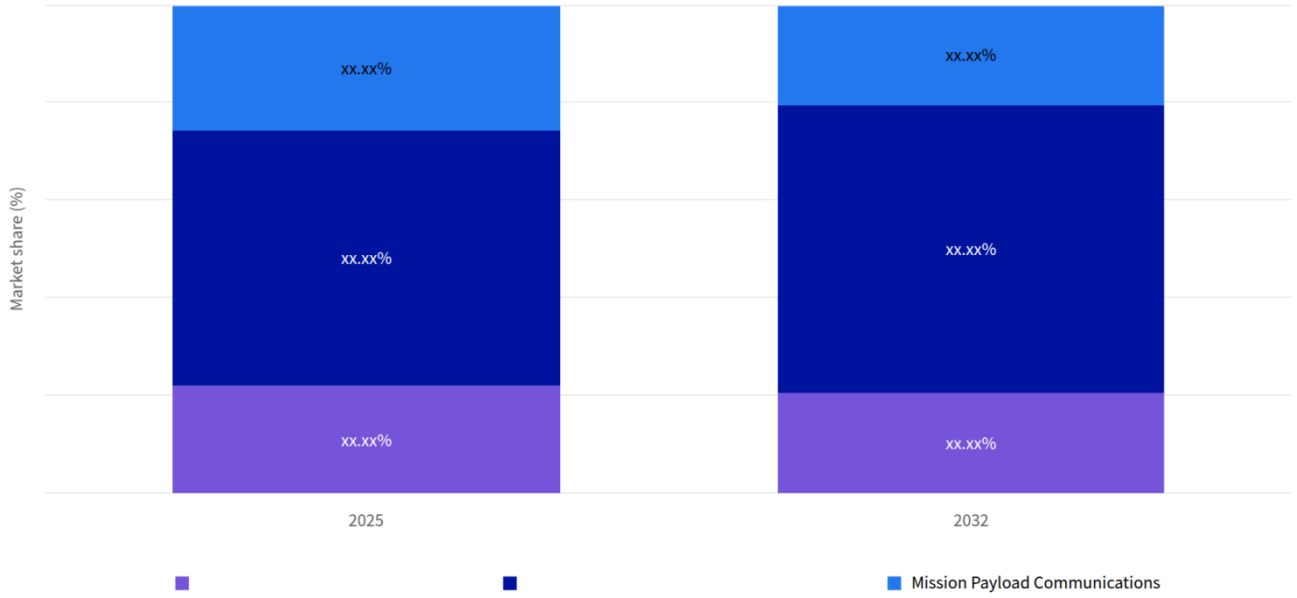

Figure 17. Global Drone Data Link System Market, by Link Function: Market size by category, 2025

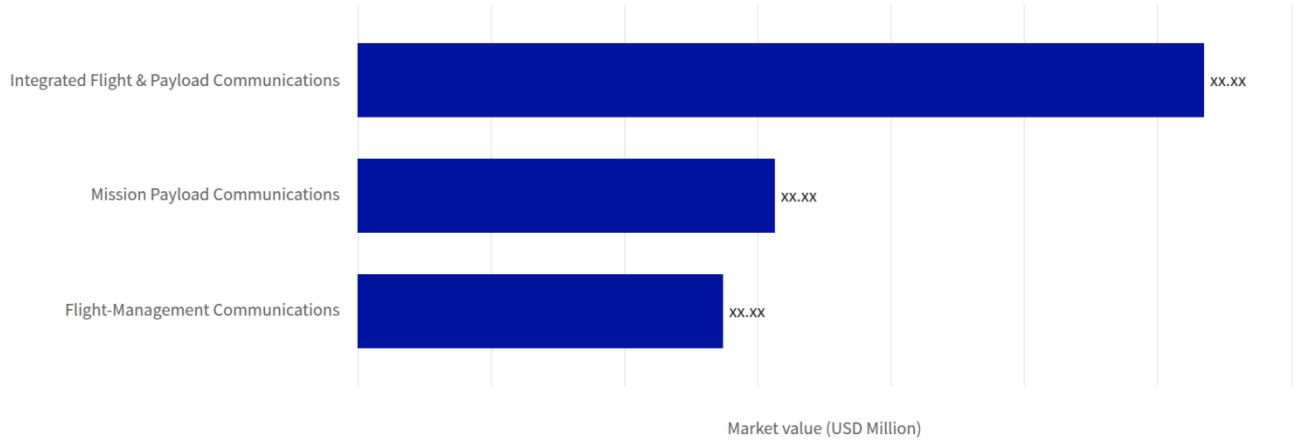

Figure 18. Global Drone Data Link System Market, by Link Function: Market size and growth, 2025-2032

Table 75. Global Drone Data Link System Market, by Link Function growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Flight-Management Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Flight & Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mission Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 76. Global Drone Data Link System Market Size, by Link Function, 2017-2032 (USD Million)

Link Function	2023	2024	2025	2026	2027	2032	CAGR (%)
Flight-Management Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Flight & Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mission Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Halo: Commercial Drone Connectivity Platform for BVLOS Operations

   · Halo's commercial description includes video, telemetry and sensor feeds within one platform, supporting integrated functional capability without establishing common authorization or acceptance. ([elsight.com](https://www.elsight.com/products/halo-for-commercial-use/))

2. Spectrum Rules and Policies for the Operation of Unmanned Aircraft Systems

   · The FCC's dedicated non-networked UAS rules limit communications to control and non-payload purposes. Product capability does not authorize unrelated payload traffic under that framework. ([federalregister.gov](https://www.federalregister.gov/documents/2025/xx.xx/xx.xx/2024-xx.xx/spectrum-rules-and-policies-for-the-operation-of-unmanned-aircraft-systems))

3. SkyLine UAS Command & Control - C2 for BVLOS

   · The marketed SkyLine ecosystem supports command-and-control and payload communications; this is capability evidence, not permission for every traffic purpose. ([uavionix.com](https://uavionix.com/uncrewed-aircraft-systems/uas-command/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.

4. Summary - ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles

   · ITU's summary distinguishes flight-control communication and flight-data transport from mission-payload services, including imagery, sensor data and signal relay. ([itu.int](https://www.itu.int/dms_pubrec/itu-t/rec/f/T-REC-F.xx.xx-xx.xx-I%xx.xx%21SUM-HTM-E.htm))

   · Taxonomy evidence: The recommendation distinguishes flight-control communication and flight-data transport from mission-payload communication services. ([itu.int](https://www.itu.int/dms_pubrec/itu-t/rec/f/T-REC-F.xx.xx-xx.xx-I%xx.xx%21SUM-HTM-E.htm))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.

5. ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles

   · ITU-T F.xx.xx recognizes stored mission data and real-time payload delivery, supporting a conditional distinction based on the information recipient's acceptance needs. ([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-F.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items))

6. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
   · Taxonomy evidence: NIST identifies transfer of both telemetry and sensor data for public-safety UAS communications. This supports distinct traffic functions but does not establish an indivisible combined-function commercial contract.
   ([nist.gov](https://www.nist.gov/ctl/pscr/research-portfolios/uncrewed-aircraft-systems))
7. ETSI TS 122 125 V19.2.0 (2026-01): Unmanned Aerial System Support in 3GPP
   · Taxonomy evidence: The specification distinguishes C2 communications from payload services. That supports function-based allocation while leaving commercial separability unresolved.
   ([etsi.org](https://www.etsi.org/deliver/etsi_ts/122100_122199/xx.xx/xx.xx.00_60/ts_122125v190200p.pdf))
8. Frequently Used Terms - ICAO
   · Taxonomy evidence: ICAO defines the C2 link by its flight-management purpose, supporting a function-based distinction rather than treating all transmitted data as mission payload.
   ([icao.int](https://www.icao.int/frequently-used-terms))
9. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
10. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
    · Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
    · Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
    · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
11. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
    · Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
12. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
    · Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
13. Telemetry Radios - Holybro Store
    · Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.

14. Motorola Solutions - March 2, 2026 Conference Transcript
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
15. Codan FY2025 Results - ASX Announcement, August 21, 2025
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
16. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
17. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
18. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
19. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
20. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
21. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

22. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
· Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
23. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
· Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
24. Part 107 Waivers - Federal Aviation Administration
· Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
· Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
25. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
· Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
26. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
· Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

10.1. Integrated Flight & Payload Communications

Table 77. Global Drone Data Link System Market Size, by Integrated Flight & Payload Communications, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 78. Global Drone Data Link System Market Size, by Integrated Flight & Payload Communications, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 79. Global Drone Data Link System Market Size, by Integrated Flight & Payload Communications, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. ITU-T Recommendation F.749.10 (05/2019): Requirements for Communication Services of Civilian Unmanned Aerial Vehicles

   · Taxonomy evidence: Flight and mission-payload services coexist within the recommendation's communications framework; an indivisible combined-function commercial branch is an analytical allocation, not an official product classification.
   ([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-F.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items))

2. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
3. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

4. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
5. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
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   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
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   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
10. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.

11. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
12. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
13. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
14. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
15. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
16. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
17. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

18. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
19. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
20. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

21. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
22. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
23. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
24. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

25. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
26. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
27. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
28. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
29. Summary - ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.

10.2. Mission Payload Communications

Table 80. Global Drone Data Link System Market Size, by Mission Payload Communications, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 81. Global Drone Data Link System Market Size, by Mission Payload Communications, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 82. Global Drone Data Link System Market Size, by Mission Payload Communications, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Summary - ITU-T Recommendation F.749.10 (05/2019), Requirements for Communication Services of Civilian Unmanned Aerial Vehicles

   · Taxonomy evidence: Mission-payload services include audio, video, imagery, sensor-data transport, and communication-signal relay. ([itu.int](https://www.itu.int/dms_pubrec/itu-t/rec/f/T-REC-F.xx.xx-xx.xx-I%xx.xx%21SUM-HTM-E.htm))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.

2. U.S. Army UAS Interoperability - July 17, 2026

   · Taxonomy evidence: ISR imagery and associated payload information are separately identified from C2 interfaces, corroborating the payload-communications function. ([army.mil](https://www.army.mil/article-amp/xx.xx/u_s_army_uas_interoperability))

3. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
4. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

5. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
6. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
7. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
8. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
9. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
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    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.

12. Elsight Limited - Appendix 4E and Annual Report 2025
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    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
15. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
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    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
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    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

19. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada

- Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))

20. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary

- Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

21. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

22. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
23. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
24. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
25. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

26. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
27. Declaração de Conformidade para Uso Próprio - Anatel
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes.
([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes.
([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
28. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator.
([faa.gov](https://www.faa.gov/media/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator.
([faa.gov](https://www.faa.gov/media/xx.xx))

10.3. Flight-Management Communications

Table 83. Global Drone Data Link System Market Size, by Flight-Management Communications, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 84. Global Drone Data Link System Market Size, by Flight-Management Communications, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 85. Global Drone Data Link System Market Size, by Flight-Management Communications, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. FAA Certificate of Waiver and Authorization 107W-2025-02991 - Pinnacle Drone Light Shows
   · Taxonomy evidence: The waiver identifies aircraft control links and real-time aircraft-status telemetry within the show deployment, independently supporting flight-management communications in an entertainment application. ([faa.gov](https://www.faa.gov/media/xx.xx))

2. Frequently Used Terms - ICAO
   · Taxonomy evidence: The C2 definition connects the remotely piloted aircraft and remote pilot station for managing flight. ([icao.int](https://www.icao.int/frequently-used-terms))
3. Summary - ITU-T Recommendation F.749.10 (05/2019), Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
   · Taxonomy evidence: Flight control and flight-data transport are expressly identified communications functions. ([itu.int](https://www.itu.int/dms_pubrec/itu-t/rec/f/T-REC-F.xx.xx-xx.xx-I%xx.xx%21SUM-HTM-E.htm))
   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
4. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
   ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
   ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.

5. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
6. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
7. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
8. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.

9. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
10. Codan FY2025 Results - ASX Announcement, August 21, 2025
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
11. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
12. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
13. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
14. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
15. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))

16. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
17. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
18. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
19. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
20. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
21. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

22. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
23. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

24. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
25. Civil Aviation Safety Authority Annual Report 2024-25
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
26. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
27. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
28. Declaração de Conformidade para Uso Próprio - Anatel
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
29. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))

11. Drone Data Link System Market, by Mission Application

Mission Application changes the purchasing trigger and acceptance context even when communications equipment is shared. ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■ ■■■ ■■■ ■■■■■■ ■■■ ■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■ ■■ ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■ ■■■■■■■■■■■■ ■■■■ ■■■■ ■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■ ■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■ ■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■■■■ ■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■ ■ ■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■■■ Program sustainment can provide continuity while limiting independent substitution; the wider aircraft support agreement does not identify every link-specific obligation.

Search, Rescue & Emergency Response places a different emphasis on service availability at the time of an incident. ■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■ ■■■■■■■ ■■■■■■■■■■■■ ■■■ ■ ■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■ ■■■■ ■■■■■■ ■■■■■■■■ ■■ ■ ■■■■■■■■ ■■■■■■■ A service based on existing infrastructure is less suitable where that infrastructure cannot support the intended response setting.

■■■■■■■■■■ ■ ■■■■■■■■■■■■ ■■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■■■■ ■ ■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■ ■■■■■■■■■ ■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■ ■■■ ■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■■■■■■ Buyers should establish whether immediate information delivery or an accepted subsequent record is the purchase trigger. Inspection imagery should not be confused with a separately contracted maintenance activity, and permission for an observation mission does not establish permission for every agricultural or forestry activity.

Transport & Logistics requires a distinction between Cargo Transport & Delivery and Uncrewed Passenger Transport. In the United States, the FAA identifies Part xx.xx certification as the route for small drones carrying another party's property for compensation beyond visual line of sight. ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■ ■■■■■ ■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■

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Media Production & Entertainment contains materially different link purchases. ■■■■■■■ ■■■ ■■■■■■■ ■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■ ■■■■■ ■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■ ■■■■ ■■■■■ ■■ ■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■ ■■■■■ ■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■■ ■ ■■■■■■■■ ■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■ ■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ Event buyers should therefore identify whether they are procuring an image feed, a coordinated show or both, and verify the relevant operator's authorization before committing to delivery.

■■■■■■■■■■■■■■ ■■■■■ ■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■ ■■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■ The buyer should identify the service recipients and the party responsible for the communications service, rather than treating the aircraft's flight-control link as the entire deliverable. A relay capability described in a standard establishes a use case, not an executed service commitment or network-access entitlement.

■■■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■ ■■■■■ ■■■■■■ ■■■ ■■ ■■■■■■■■■ ■■■■ ■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■■■■ ■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■ Educational purchasers should establish institutional eligibility and the intended activity, while recreational and sporting buyers should confirm applicable operating and event requirements. Existing communications equipment may serve several purposes, but changing its use can change access conditions without changing its technology category.

Figure 19. Global Drone Data Link System Market Size, by Mission Application, 2025 vs 2032 (%)

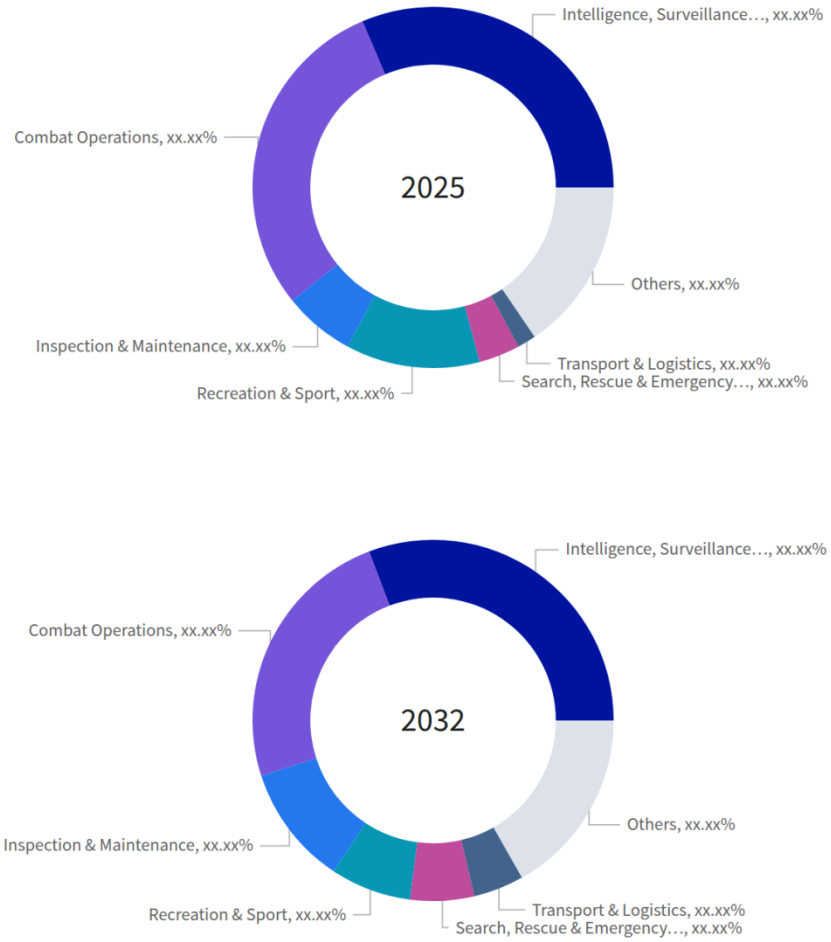

Figure 20. Global Drone Data Link System Market Size, by Mission Application, 2025 vs 2026 vs 2032

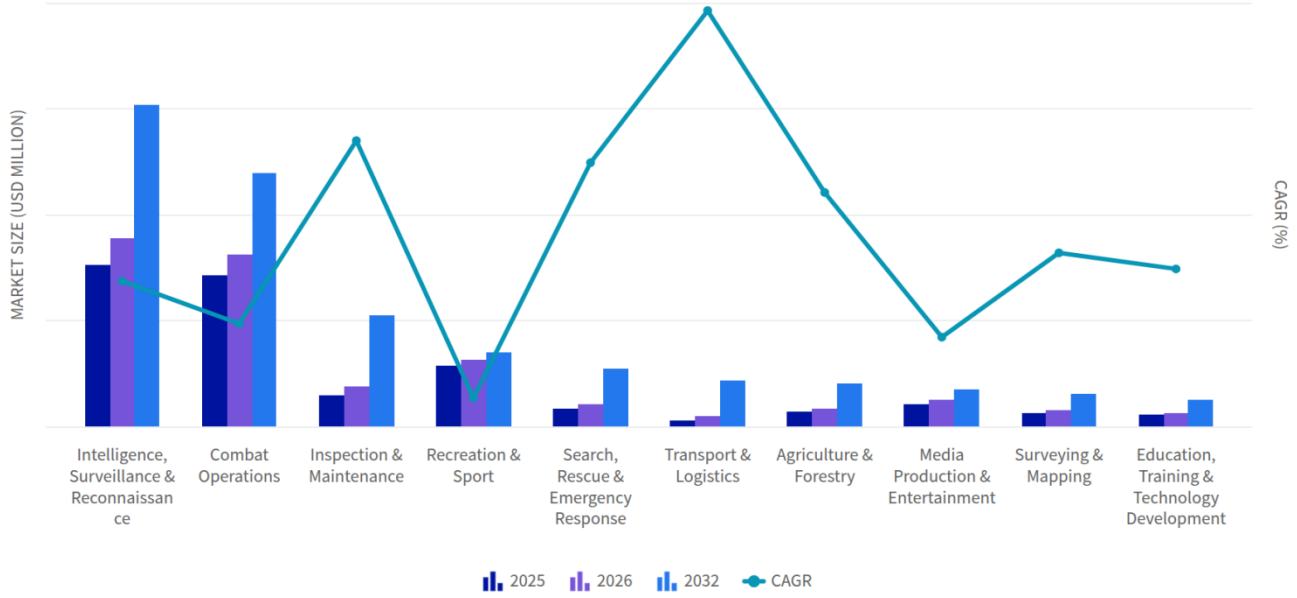

Table 86. Global Drone Data Link System Market, by Mission Application growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Agriculture & Forestry	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combat Operations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Communications Relay	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education, Training & Technology Development	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Inspection & Maintenance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intelligence, Surveillance & Reconnaissance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Media Production & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Sport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific Research & Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Search, Rescue & Emergency Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Surveying & Mapping	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transport & Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 87. Global Drone Data Link System Market Size, by Mission Application, 2017-2032 (USD Million)

Mission Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Agriculture & Forestry	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combat Operations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Communications Relay	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education, Training & Technology Development	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Inspection & Maintenance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intelligence, Surveillance & Reconnaissance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Media Production & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Sport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific Research & Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Search, Rescue & Emergency Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Surveying & Mapping	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transport & Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Swisscom Broadcast and Nokia build joint drone network across Switzerland

   · Swisscom's August xx.xx 2024 announcement describes first-responder and inspection services. It supports a managed purchasing alternative, not incident-specific availability or completion of the entire announced network.
   ([swisscom.ch](https://www.swisscom.ch/en/about/news/2024/xx.xx/xx.xx-drohnennetzwerk-schweiz.html))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.

2. Uncrewed Aircraft Systems - NIST Public Safety Communications Research

   · NIST identifies first-responder communications needs in environments with degraded or destroyed infrastructure, supporting incident-area availability as a purchasing condition.
   ([nist.gov](https://www.nist.gov/ctl/pscr/research-portfolios/uncrewed-aircraft-systems))

3. ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
   - The recommendation identifies inspection, surveillance, disaster, agricultural and scientific information settings. It does not establish a universal live-service requirement for those applications. ([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-F.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items))
   - Taxonomy evidence: Appendix I names civilian-UAV communication-service applications across agriculture, inspection, surveillance, disaster monitoring, media, logistics, and research. ([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-F.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items))
4. Desider, Issue 199, June 2025 - Protector Enters Service
   - The June 2025 UK government publication reports Protector entering service as an armed remotely piloted program and describes a continuing industry support arrangement. It does not isolate every communications obligation within the wider program. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/685bf0de0433072fce0e1001/desider_-_issue_199__June_2025.pdf))
5. Drone Regulatory System - Understanding European Drone Regulations and the Aviation Regulatory System
   - EASA identifies infrastructure inspection, surveying, agricultural monitoring, environmental monitoring, emergency response, filming and educational applications. Their differing information acceptance needs are analytical implications, not a regulator-prescribed market partition. ([easa.europa.eu](https://www.easa.europa.eu/en/domains/drones-air-mobility/drones-air-mobility-landscape/Understanding-European-Drone-Regulations-and-the-Aviation-Regulatory-System))
6. Drone Integration: Concept of Operations - May 2025
   - The FAA concept of operations distinguishes agricultural observation from activities subject to agricultural-operator requirements and includes forest preservation within the agricultural context. Only these high-level permission differences are used. ([faa.gov](https://www.faa.gov/uas/resources/policy_library/Drone-Integration-Concept-of-Operations-May-2025.pdf))
7. Matt A Burgess, PhD - U.S. Geological Survey
   - USGS's official profile describes scientific and environmental UAS applications and the National Uncrewed Systems Office's data-collection role for DOI and USGS scientists. No experimental methods or personnel participation claims are used. ([usgs.gov](https://www.usgs.gov/staff-profiles/matt-a-burgess))
8. Package Delivery by Drone (Part 135)
   - The FAA identifies Part xx.xx certification as the route for small drones carrying another party's property for compensation beyond visual line of sight. This supports a cargo-specific access condition, not passenger or Global authorization. ([faa.gov](https://www.faa.gov/uas/advanced_operations/package_delivery_drone))
9. EHang EH216-S Interpretation Series: Air Operator Certificate
   - EHang reported operator certificates issued on March xx.xx 2025 and explained that their initial human-carrying scope involved tourism and flight experiences returning to the departure location. The account does not establish unrestricted point-to-point transport permission. ([ehang.com](https://www.ehang.com/news/xx.xx.html))
10. FAA Certificate of Waiver and Authorization 107W-2025-02991 - Pinnacle Drone Light Shows
    - The FAA issued Pinnacle Drone Light Shows a nontransferable waiver with an effective period beginning September xx.xx 2025 and communications-related conditions. It establishes a specific show setting, not another operator's permission. ([faa.gov](https://www.faa.gov/media/xx.xx))
11. ITU-T Y.4215: Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things
    - ITU-T Y.xx.xx identifies UAS-aided relaying and emergency response as separate communications use cases. This establishes the mission role, not an executed supplier service commitment. ([itu.int](https://www.itu.int/itu-t/recommendations/rec.aspx?lang=en&rec=xx.xx))
12. Educational Users - Federal Aviation Administration
    - FAA educational guidance distinguishes qualifying institutional pathways and Part xx.xx activity. Educational purpose alone does not identify one universal operating entitlement. ([faa.gov](https://www.faa.gov/uas/educational_users))

13. FAI Drone Racing World Cup - World Air Sports Federation
· FAI describes the Drone Racing World Cup as a series of open international competitive drone events, establishing sport as a distinct application setting.
([fai.org](https://www.fai.org/event/fai-drone-racing-world-cup))
14. Recreational Flyers & Community-Based Organizations - Federal Aviation Administration
· The FAA distinguishes recreational purpose from compensation and identifies nonrecreational examples, supporting activity-specific permission checks across recreational and other missions.
([faa.gov](https://www.faa.gov/uas/recreational_flyers))
15. ITU-T Recommendation M.3391 (03/2025): Requirements for Smart Maintenance of Telecommunication Infrastructure Based on Unmanned Aerial Vehicles
· Taxonomy evidence: The recommendation provides a specialized infrastructure-maintenance demand setting. Treating that objective separately from generic surveying is an analytical primary-purpose rule, not a claim that ITU prescribes this complete market partition.
([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-M.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items)
)
16. Drones & Air Mobility Benefits for European Citizens and Air Transport - EASA
· Taxonomy evidence: EASA identifies drone applications including delivery, photography, disaster management, rescue, mapping, inspection, agriculture, and surveillance.
([easa.europa.eu](https://www.easa.europa.eu/en/domains/drones-air-mobility/drones-air-mobility-landscape/benefits))
17. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
· Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
18. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
· Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
· Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
19. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.

20. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
21. Telemetry Radios - Holybro Store
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
22. Motorola Solutions - March 2, 2026 Conference Transcript
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
23. Codan FY2025 Results - ASX Announcement, August 21, 2025
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
24. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.

25. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
26. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
27. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
28. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
29. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
30. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
31. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

32. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
33. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
34. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
35. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
36. DJI Agriculture Reveals Global Adoption of Agricultural Drones Cuts 51Mt in Carbon Emissions and Saves 410Mts of Water for Farmers Globally
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
37. DJI Agriculture's Annual Report Reveals Drone-Powered Farming Revolution at Brazil's Agrishow 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
38. EHang Reports Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results - SEC Exhibit 99.1
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.

39. ITU-T Y.4215 - Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
40. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.

11.1. Intelligence, Surveillance & Reconnaissance

Table 88. Global Drone Data Link System Market Size, by Intelligence, Surveillance & Reconnaissance, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 89. Global Drone Data Link System Market Size, by Intelligence, Surveillance & Reconnaissance, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 90. Global Drone Data Link System Market Size, by Intelligence, Surveillance & Reconnaissance, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. ITU-T Recommendation F.749.10 (05/2019): Requirements for Communication Services of Civilian Unmanned Aerial Vehicles

   · Taxonomy evidence: Police and traffic-security surveillance are named civilian-UAV communications applications.
   ([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-F.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items))

2. U.S. Army UAS Interoperability - July 17, 2026

   · Taxonomy evidence: The Army's July xx.xx 2026 publication identifies UAS data links, C2 interfaces, and ISR payload-data dissemination as distinct interoperability disciplines.
   ([army.mil](https://www.army.mil/article-amp/xx.xx/u_s_army_uas_interoperability))

3. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
4. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

5. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
6. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
7. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
8. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
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    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
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    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
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18. Part 107 Waivers - Federal Aviation Administration
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    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
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    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
20. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

21. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

22. Trends in International Arms Transfers, 2025 - SIPRI, March 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

23. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
24. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
25. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
26. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
27. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
28. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))

11.2. Combat Operations

Table 91. Global Drone Data Link System Market Size, by Combat Operations, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 92. Global Drone Data Link System Market Size, by Combat Operations, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 93. Global Drone Data Link System Market Size, by Combat Operations, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Desider, Issue 199, June 2025 - Next-Generation Armed RPAS Protector Enters Service
   - Taxonomy evidence: The June 2025 government publication reports Protector entering service as an armed remotely piloted aircraft system, corroborating the combat-oriented demand setting without isolating communications expenditure. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/685bf0de0433072fce0e1001/desider_-_issue_199__June_2025.pdf))
2. Protector Enters Service with Royal Air Force - June 16, 2025
   - Taxonomy evidence: The June xx.xx 2025 announcement identifies strike operations among Protector's intended remotely piloted roles, establishing a combat demand setting without isolating communications revenue. ([raf.mod.uk](https://www.raf.mod.uk/news/articles/protector-enters-service-with-royal-air-force/))

3. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
4. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

5. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
6. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
7. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
8. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
9. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
10. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.

11. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
12. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
13. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
14. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
15. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
16. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

17. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results

    · Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.

    · Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

18. Part 107 Waivers - Federal Aviation Administration

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.

    · Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

19. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))

20. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary

    · Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

21. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
22. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

23. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
24. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
25. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
26. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
27. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
28. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))

11.3. Recreation & Sport

Table 94. Global Drone Data Link System Market Size, by Recreation & Sport, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 95. Global Drone Data Link System Market Size, by Recreation & Sport, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 96. Global Drone Data Link System Market Size, by Recreation & Sport, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Recreational Flyers & Community-Based Organizations - FAA
   · Taxonomy evidence: The FAA distinguishes flying solely for recreation from nonrecreational purposes, supporting recreation as a mission-purpose category rather than a synonym for all unpaid activity. ([faa.gov](https://www.faa.gov/uas/recreational_flyers))
2. FAI Drone Racing World Cup - World Air Sports Federation
   · Taxonomy evidence: FAI identifies its Drone Racing World Cup as an international series of competitive drone-piloting events, independently establishing sport as a distinct mission setting. ([fai.org](https://www.fai.org/event/fai-drone-racing-world-cup))

3. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
4. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

5. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
6. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
7. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
8. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
9. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
10. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.

11. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
12. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
13. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
14. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
15. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
16. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
17. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

18. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
19. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
20. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

21. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

22. Trends in International Arms Transfers, 2025 - SIPRI, March 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

23. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
24. Civil Aviation Safety Authority Annual Report 2024-25
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
25. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
26. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
27. Declaração de Conformidade para Uso Próprio - Anatel
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
28. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))

11.4. Inspection & Maintenance

Table 97. Global Drone Data Link System Market Size, by Inspection & Maintenance, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 98. Global Drone Data Link System Market Size, by Inspection & Maintenance, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 99. Global Drone Data Link System Market Size, by Inspection & Maintenance, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. ITU-T Recommendation M.3391 (03/2025): Requirements for Smart Maintenance of Telecommunication Infrastructure Based on Unmanned Aerial Vehicles

   · Taxonomy evidence: ITU-T M.xx.xx approved March xx.xx 2025, recognizes UAV-based patrol supporting maintenance of outdoor telecommunications infrastructure. Its smart-maintenance scope supports inspection and condition-assessment demand; it does not independently establish drone-performed physical repair or attributable link sales.
   ([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-M.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items)
)

2. ITU-T Recommendation F.749.10 (05/2019): Requirements for Communication Services of Civilian Unmanned Aerial Vehicles

   · Taxonomy evidence: Power-line and petroleum-pipeline inspection are explicit communications-service use cases; physical maintenance is not established by this record.
   ([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-F.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items))

3. Drone Integration: Concept of Operations - FAA, May 2025

   · Taxonomy evidence: The May 2025 document identifies infrastructure inspection among demonstrated drone applications.
   ([faa.gov](https://www.faa.gov/uas/resources/policy_library/Drone-Integration-Concept-of-Operations-May-2025.pdf))

4. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
5. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

6. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
7. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
8. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
9. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
10. Codan FY2025 Results - ASX Announcement, August 21, 2025
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
11. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
12. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.

13. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
14. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
15. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
16. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
17. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
18. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
19. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

20. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
21. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
22. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

23. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
24. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
25. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
26. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

27. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
28. Declaração de Conformidade para Uso Próprio - Anatel
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes.
([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes.
([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
29. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator.
([faa.gov](https://www.faa.gov/media/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator.
([faa.gov](https://www.faa.gov/media/xx.xx))
30. CY 2024 Small Unmanned Aircraft Systems Survey Report
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
31. Swisscom Broadcast and Nokia Build Joint Drone Network Across Switzerland
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.

11.5. Media Production & Entertainment

Table 100. Global Drone Data Link System Market Size, by Media Production & Entertainment, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 101. Global Drone Data Link System Market Size, by Media Production & Entertainment, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 102. Global Drone Data Link System Market Size, by Media Production & Entertainment, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. FAA Certificate of Waiver and Authorization 107W-2025-02991 - Pinnacle Drone Light Shows

   · Taxonomy evidence: FAA waiver 107W-2025-xx.xx expressly concerns drone light-show operations and identifies their C2, transmission, and telemetry functions. Its stated effective period begins September xx.xx 2025; it establishes a specific entertainment demand setting, not separately priced link revenue or universal authorization. ([faa.gov](https://www.faa.gov/media/xx.xx))

2. Drones & Air Mobility Benefits for European Citizens and Air Transport - EASA

   · Taxonomy evidence: Photography and filming are described as commercial drone applications; the record does not isolate communications value for entertainment performances. ([easa.europa.eu](https://www.easa.europa.eu/en/domains/drones-air-mobility/drones-air-mobility-landscape/benefits))

3. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
4. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

5. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
6. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
7. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
8. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
9. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
10. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.

11. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
12. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
13. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
14. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
15. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
16. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
17. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

18. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
19. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
20. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

21. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

22. Trends in International Arms Transfers, 2025 - SIPRI, March 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

23. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
24. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
25. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
26. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
27. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
28. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))

11.6. Search, Rescue & Emergency Response

Table 103. Global Drone Data Link System Market Size, by Search, Rescue & Emergency Response, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 104. Global Drone Data Link System Market Size, by Search, Rescue & Emergency Response, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 105. Global Drone Data Link System Market Size, by Search, Rescue & Emergency Response, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
   · Taxonomy evidence: The portfolio's stated demand setting includes disasters, emergencies, fire-related data collection, and wide-area search.
   ([nist.gov](https://www.nist.gov/ctl/pscr/research-portfolios/uncrewed-aircraft-systems))
2. ITU-T Recommendation F.749.10 (05/2019): Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
   · Taxonomy evidence: Natural-disaster monitoring is identified as a civilian-UAV communication-service application.
   ([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-F.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items))
3. ITU-T Recommendation Y.4215 (02/2022): Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things
   · Taxonomy evidence: The recommendation separately recognizes UAS-aided emergency-response communications, supporting an emergency demand setting without making every emergency relay deployment a distinct topology category.
   ([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-Y.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items))
4. Drones & Air Mobility Benefits for European Citizens and Air Transport - EASA
   · Taxonomy evidence: Rescue and firefighting applications explicitly use real-time information and aerial imagery for response decisions.
   ([easa.europa.eu](https://www.easa.europa.eu/en/domains/drones-air-mobility/drones-air-mobility-landscape/benefits))

5. IFRC Drones Group

   · Taxonomy evidence: The group explicitly addresses aerial assessment and information supporting humanitarian disaster response. (drones.preparecenter.org)

6. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China

   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
   ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
   ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.

7. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.

   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares.
   ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares.
   ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

8. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
9. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
10. Telemetry Radios - Holybro Store
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
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    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
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    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
19. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
20. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
21. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

22. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada

- Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))

23. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary

- Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

24. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

25. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
26. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
27. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
28. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

29. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
30. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
31. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
32. Swisscom Broadcast and Nokia Build Joint Drone Network Across Switzerland
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.

11.7. Agriculture & Forestry

Table 106. Global Drone Data Link System Market Size, by Agriculture & Forestry, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 107. Global Drone Data Link System Market Size, by Agriculture & Forestry, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 108. Global Drone Data Link System Market Size, by Agriculture & Forestry, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. ITU-T Recommendation F.749.10 (05/2019): Requirements for Communication Services of Civilian Unmanned Aerial Vehicles

   · Taxonomy evidence: Agriculture-related civilian-UAV communication services are explicitly identified. ([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-F.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items))

2. Drone Integration: Concept of Operations - FAA, May 2025
   - Taxonomy evidence: The document recognizes agricultural assessment and aerial agricultural work, with forestry preservation within its agricultural context. Only these high-level application categories are used. ([faa.gov](https://www.faa.gov/uas/resources/policy_library/Drone-Integration-Concept-of-Operations-May-2025.pdf))
3. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
4. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

5. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
6. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
7. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
8. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
9. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
10. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
11. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.

12. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
13. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
14. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
15. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
16. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
17. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
18. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

19. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
20. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
21. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

22. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
23. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
24. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
25. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

26. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
27. Declaração de Conformidade para Uso Próprio - Anatel
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes.
([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes.
([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
28. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator.
([faa.gov](https://www.faa.gov/media/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator.
([faa.gov](https://www.faa.gov/media/xx.xx))
29. DJI Agriculture Reveals Global Adoption of Agricultural Drones Cuts 51Mt in Carbon Emissions and Saves 410Mts of Water for Farmers Globally
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
30. DJI Agriculture's Annual Report Reveals Drone-Powered Farming Revolution at Brazil's Agrishow 2025
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.

11.8. Surveying & Mapping

Table 109. Global Drone Data Link System Market Size, by Surveying & Mapping, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 110. Global Drone Data Link System Market Size, by Surveying & Mapping, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 111. Global Drone Data Link System Market Size, by Surveying & Mapping, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Drones & Air Mobility Benefits for European Citizens and Air Transport - EASA
   - Taxonomy evidence: Geographic mapping is identified as a drone use case. ([easa.europa.eu](https://www.easa.europa.eu/en/domains/drones-air-mobility/drones-air-mobility-landscape/benefits))
2. Drone Integration: Concept of Operations - FAA, May 2025
   - Taxonomy evidence: Aerial surveying is identified as a drone application addressed in the integration framework. ([faa.gov](https://www.faa.gov/uas/resources/policy_library/Drone-Integration-Concept-of-Operations-May-2025.pdf))

3. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
4. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

5. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
6. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
7. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
8. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
9. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
10. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
11. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.

12. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
13. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
14. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
15. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
16. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
17. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
18. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

19. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada

- Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))

20. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary

- Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

21. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

22. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
23. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

26. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
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([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes.
([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
28. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator.
([faa.gov](https://www.faa.gov/media/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator.
([faa.gov](https://www.faa.gov/media/xx.xx))
29. CY 2024 Small Unmanned Aircraft Systems Survey Report
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.

11.9. Education, Training & Technology Development

Table 112. Global Drone Data Link System Market Size, by Education, Training & Technology Development, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 113. Global Drone Data Link System Market Size, by Education, Training & Technology Development, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 114. Global Drone Data Link System Market Size, by Education, Training & Technology Development, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Drone Integration: Concept of Operations - FAA, May 2025

   · Taxonomy evidence: Flight testing and demonstration are identified application settings, not evidence of commercial drone-link revenue.
   ([faa.gov](https://www.faa.gov/uas/resources/policy_library/Drone-Integration-Concept-of-Operations-May-2025.pdf))

2. Educational Users - FAA, Updated March 13, 2026
   - Taxonomy evidence: The FAA's educational-user publication identifies universities, colleges, technical schools, and educational programs using drones for education and research. ([faa.gov](https://www.faa.gov/uas/educational_users))
3. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
4. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

5. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
6. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
7. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
8. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
9. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
10. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
11. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.

12. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
13. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
14. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
15. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
16. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
17. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
18. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

19. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
20. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
21. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

22. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
23. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
24. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
25. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

26. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
27. Declaração de Conformidade para Uso Próprio - Anatel
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
28. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
29. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.

11.10. Transport & Logistics

Table 115. Global Drone Data Link System Market, by Transport & Logistics growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Cargo Transport & Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Uncrewed Passenger Transport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 116. Global Drone Data Link System Market Size, by Transport & Logistics, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 117. Global Drone Data Link System Market Size, by Transport & Logistics, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 118. Global Drone Data Link System Market Size, by Transport & Logistics, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 先行先试 多地探索全空间无人体系建设 - 中国发展改革报社, May 19, 2025, Published by NDRC

   · Taxonomy evidence: Pilotless passenger carriage is a distinct transport demand setting alongside separately evidenced cargo delivery; the market includes only its identifiable unmanned-aircraft communications portion. ([ndrc.gov.cn](https://www.ndrc.gov.cn/wsdwhfz/xx.xx/t20250519_1397787_ext.html))

2. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
3. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares.
([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares.
([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

4. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
5. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
6. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
7. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
8. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
9. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
10. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.

11. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
12. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
13. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
14. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
15. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
16. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
17. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

18. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
19. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
20. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

21. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
22. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
23. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
24. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

25. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
26. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
27. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
28. EHang Reports Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results - SEC Exhibit 99.1
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
29. Zipline to Triple U.S. Manufacturing Facility, Creating More Jobs in AI and Robotics
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.

11.10.1. Cargo Transport & Delivery

Table 119. Global Drone Data Link System Market Size, by Cargo Transport & Delivery, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 120. Global Drone Data Link System Market Size, by Cargo Transport & Delivery, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 121. Global Drone Data Link System Market Size, by Cargo Transport & Delivery, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. ITU-T Recommendation F.749.10 (05/2019): Requirements for Communication Services of Civilian Unmanned Aerial Vehicles

   · Taxonomy evidence: Logistics express delivery is a named civilian-UAV communication-service use case. ([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-F.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items))

2. Drone Integration: Concept of Operations - FAA, May 2025

   · Taxonomy evidence: Package delivery is a recognized drone application. ([faa.gov](https://www.faa.gov/uas/resources/policy_library/Drone-Integration-Concept-of-Operations-May-2025.pdf))

3. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
4. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

5. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
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   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
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12. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
13. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
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    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
15. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
16. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
17. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
18. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

19. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
20. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
21. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

22. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
23. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
24. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
25. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

26. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
27. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
28. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
29. Zipline to Triple U.S. Manufacturing Facility, Creating More Jobs in AI and Robotics
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.

11.10.2. Uncrewed Passenger Transport

Table 122. Global Drone Data Link System Market Size, by Uncrewed Passenger Transport, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 123. Global Drone Data Link System Market Size, by Uncrewed Passenger Transport, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 124. Global Drone Data Link System Market Size, by Uncrewed Passenger Transport, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 先行先试 多地探索全空间无人体系建设 - 中国发展改革报社, May 19, 2025, Published by NDRC

   · Taxonomy evidence: The dated May xx.xx 2025 newspaper report published by NDRC describes a pilotless passenger-sightseeing demonstration and reports operator-certificate issuance on March xx.xx 2025. This corroborates a dated passenger application only; the exact certificate conditions and attributable drone-link purchases are not established by the article. No research-estimate claims on the page are used. ([ndrc.gov.cn](https://www.ndrc.gov.cn/wsdwhfz/xx.xx/t20250519_1397787_ext.html))

   · Taxonomy evidence: The May xx.xx 2025 official article reports March xx.xx 2025 operating-certificate issuance for pilotless passenger aircraft and describes a passenger-sightseeing demonstration. It establishes the passenger application, not attributable drone-link sales or unrestricted transport authorization. ([ndrc.gov.cn](https://www.ndrc.gov.cn/wsdwhfz/xx.xx/t20250519_1397787_ext.html))

2. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China

   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.

3. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
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    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))

14. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
15. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
16. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
17. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
18. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
19. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

20. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
21. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

22. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
23. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
24. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
25. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
26. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
27. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))

28. EHang Reports Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results - SEC Exhibit 99.1
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.

11.11. Scientific Research & Environmental Monitoring

Table 125. Global Drone Data Link System Market Size, by Scientific Research & Environmental Monitoring, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 126. Global Drone Data Link System Market Size, by Scientific Research & Environmental Monitoring, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 127. Global Drone Data Link System Market Size, by Scientific Research & Environmental Monitoring, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. ITU-T Recommendation F.749.10 (05/2019): Requirements for Communication Services of Civilian Unmanned Aerial Vehicles

· Taxonomy evidence: The recommendation recognizes scientific-research data transport and meteorological and territorial-resource applications.
([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-F.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items))

2. National Uncrewed Systems Office - U.S. Geological Survey

· Taxonomy evidence: USGS describes UAS data collection for scientific remote sensing, water-quality research, and environmental restoration, establishing a scientific and environmental demand setting.
([usgs.gov](https://www.usgs.gov/programs/national-land-imaging-program/science/national-uncrewed-systems-office))

3. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
4. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

5. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
6. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
7. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
8. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
9. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
10. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
11. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.

12. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
13. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
14. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
15. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
16. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
17. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
18. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

19. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
20. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
21. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

22. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
23. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
24. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
25. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

26. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
27. Declaração de Conformidade para Uso Próprio - Anatel
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes.
([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes.
([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
28. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator.
([faa.gov](https://www.faa.gov/media/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator.
([faa.gov](https://www.faa.gov/media/xx.xx))

11.12. Communications Relay

Table 128. Global Drone Data Link System Market Size, by Communications Relay, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 129. Global Drone Data Link System Market Size, by Communications Relay, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 130. Global Drone Data Link System Market Size, by Communications Relay, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. ETSI TS 122 125 V19.2.0 (2026-01): Unmanned Aerial System Support in 3GPP
   · Taxonomy evidence: An onboard radio access node provides connectivity to user equipment, independently supporting an airborne communications-platform use case. The standard does not disclose communications-relay market revenue.
   ([etsi.org](https://www.etsi.org/deliver/etsi_ts/122100_122199/xx.xx/xx.xx.00_60/ts_122125v190200p.pdf))

2. ITU-T Recommendation Y.4215 (02/2022): Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things

   · Taxonomy evidence: ITU-T identifies UAS-aided relaying and offloading as applications in which unmanned aircraft act as communications platforms. ([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-Y.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.

3. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China

   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.

4. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
5. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
6. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
7. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.

8. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
9. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
10. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
11. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
12. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
13. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
14. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))

15. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
16. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
17. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
18. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
19. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
20. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

21. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

22. Trends in International Arms Transfers, 2025 - SIPRI, March 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

23. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
24. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
25. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
26. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
27. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
28. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))

12. Drone Data Link System Market, by End User

[illegible] Suppliers should establish the commissioning unit, applicable procurement eligibility and acceptance authority rather than apply a defense purchasing condition to every public institution. Component screening can support consideration, but the relevant procurement and offering status still require confirmation.

[illegible] A link supplier addressing the service operator must resolve continuing support and connectivity relationships; a supplier addressing the mission customer must make the included communications contribution and retained duties visible. Managed delivery is suitable when those responsibilities match the customer's needs, while direct equipment purchasing better preserves control for customers able to manage the relationships themselves.

Nonprofit Institutions have a documented demand setting independent of both government and household consumption. [illegible] Consequently, a donated or unpaid deployment still requires activity-specific permission and accountable support.

Individual & Household Consumers can purchase an integrated retail ecosystem rather than a separately negotiated communications service. [illegible] Personal ownership does not make every subsequent activity recreational: the FAA's purpose-based distinction means that a change to organizational or service use can require a different permission assessment even when the equipment is unchanged.

Figure 21. Global Drone Data Link System Market, by End User: Market share evolution, 2025-2032

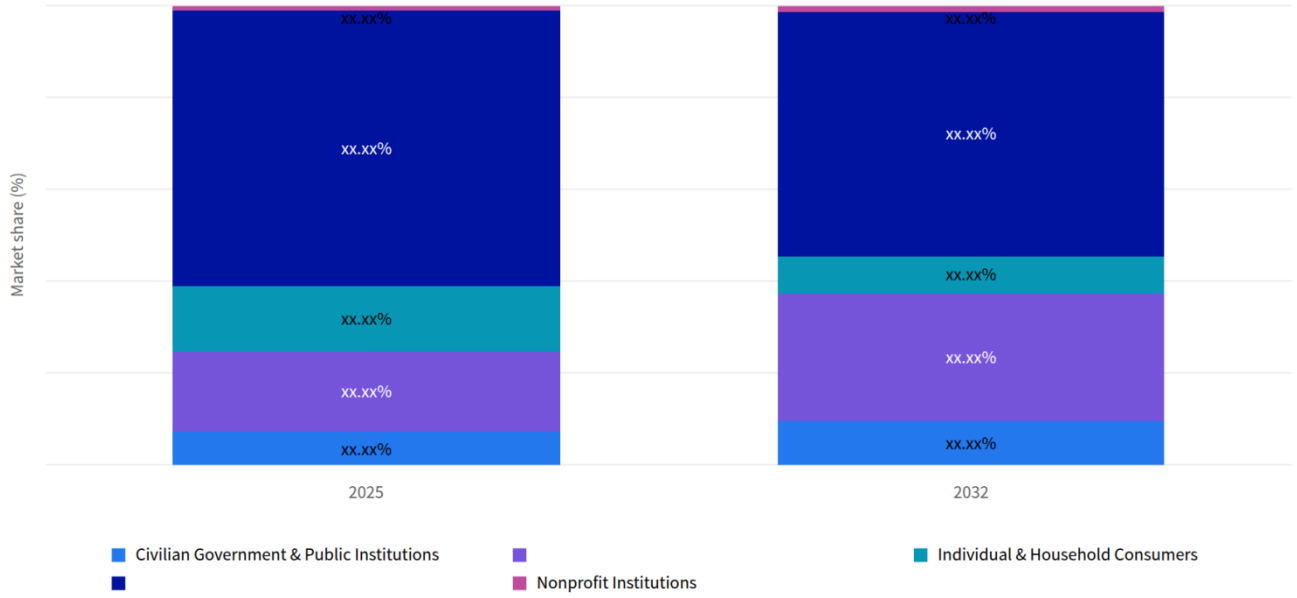

Figure 22. Global Drone Data Link System Market, by End User: Market size by category, 2025

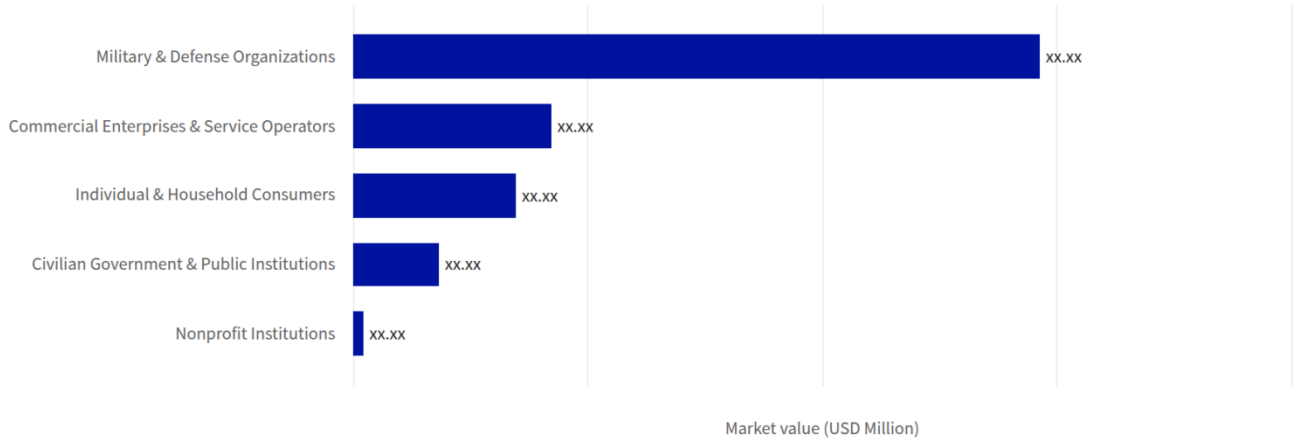

Figure 23. Global Drone Data Link System Market, by End User: Market size and growth, 2025-2032

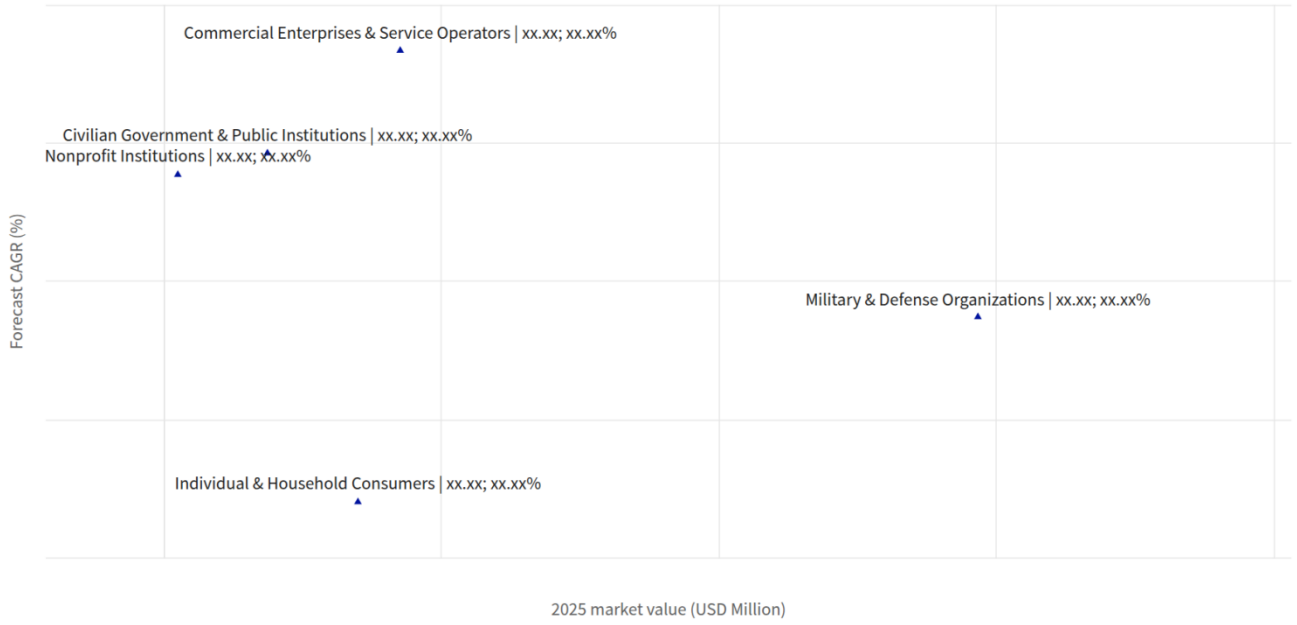

Table 131. Global Drone Data Link System Market, by End User growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Civilian Government & Public Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Enterprises & Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Individual & Household Consumers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Military & Defense Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonprofit Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 132. Global Drone Data Link System Market Size, by End User, 2017-2032 (USD Million)

End User	2023	2024	2025	2026	2027	2032	CAGR (%)
Civilian Government & Public Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Enterprises & Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Individual & Household Consumers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Military & Defense Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonprofit Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Swisscom Broadcast and Nokia build joint drone network across Switzerland
   - Swisscom describes customers purchasing drone services combining infrastructure, applications and data storage, illustrating the distinction between a mission customer and the operator coordinating communications. ([swisscom.ch](https://www.swisscom.ch/en/about/news/2024/xx.xx/xx.xx-drohnennetzwerk-schweiz.html))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.
2. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
   - DIU distinguishes its complete-aircraft list from its framework of interoperable components and software and differentiates verification candidates from completed additions. Procurement applicability remains offering-specific. ([diu.mil](https://www.diu.mil/latest/blue-uas-refresh-list-and-framework-platforms-and-capabilities-selected))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
3. Aquila20 FPV Kit - BETAFPV
   - BETAFPV's retail kit includes the aircraft, goggles and controller. It illustrates an integrated consumer purchase, not a standalone-link entitlement or universal replacement compatibility. ([betafpv.com](https://betafpv.com/products/aquila20-fpv-kit))
4. Matt A Burgess, PhD - U.S. Geological Survey
   - The official material identifies USGS and DOI scientists as institutional users of unmanned-aircraft data collection, establishing a civilian government setting distinct from defense procurement. ([usgs.gov](https://www.usgs.gov/staff-profiles/matt-a-burgess))
5. Recreational Flyers & Community-Based Organizations - Federal Aviation Administration
   - FAA guidance explicitly identifies volunteer drone activity for a nonprofit as potentially nonrecreational. Nonprofit status and personal ownership do not independently determine permission. ([faa.gov](https://www.faa.gov/uas/recreational_flyers))

6. IFRC Drones Group

· The IFRC Drones Group identifies National Societies, the Federation Secretariat and ICRC participants and connects drone capabilities with humanitarian mandates and legal and ethical frameworks. It establishes an institutional demand setting, not individual purchasing capability or exemption. (drones.preparecenter.org)

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.

7. Frequently Used Terms - ICAO

· Taxonomy evidence: ICAO's operator definition includes persons, organizations, and enterprises engaged in aircraft operations, supporting separation of operating customers from equipment-selling intermediaries. ([icao.int](https://www.icao.int/frequently-used-terms))

8. Educational Users - FAA, Updated March 13, 2026

· Taxonomy evidence: Educational users can operate through more than one regulatory pathway; educational purpose therefore does not by itself establish a mutually exclusive institutional buyer sector. ([faa.gov](https://www.faa.gov/uas/educational_users))

9. Main Concepts and Definitions of Foreign Direct Investment - OECD Benchmark Definition of Foreign Direct Investment, Fifth Edition, 2025

· Taxonomy evidence: The OECD's 2025 benchmark distinguishes households from independently recognized corporations, nonprofit institutions, and government units, supporting institutional rather than mission-based buyer classification. ([oecd.org](https://www.oecd.org/en/publications/2025/xx.xx/oecd-benchmark-definition-of-foreign-direct-investment-fifth-edition_38a25baf/full-report/main-concepts-and-definitions-of-foreign-direct-investment_c3240e7d.html))

10. Conceptual Framework - OECD Handbook on the Compilation of Household Distributional Results on Income, Consumption and Saving in Line with National Accounts Totals, 2024

· Taxonomy evidence: The conceptual framework distinguishes corporations, general government, households, and nonprofit institutions serving households as institutional sectors; the drone-buyer partition is an explicit adaptation of these distinctions. ([oecd.org](https://www.oecd.org/en/publications/oecd-handbook-on-the-compilation-of-household-distributional-results-on-income-consumption-and-saving-in-line-with-national-accounts-totals_5a3b9119-en/full-report/component-xx.xx.html))

11. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China

· Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.

12. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility

· Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.

· Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.

· Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.

13. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
14. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
15. Telemetry Radios - Holybro Store
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
16. Motorola Solutions - March 2, 2026 Conference Transcript
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
17. Codan FY2025 Results - ASX Announcement, August 21, 2025
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
18. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
19. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
20. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.

21. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
22. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
23. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
24. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
25. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
26. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
27. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
28. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

29. DJI O4 Air Unit Series - FAQ
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.
30. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.

12.1. Military & Defense Organizations

Table 133. Global Drone Data Link System Market Size, by Military & Defense Organizations, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 134. Global Drone Data Link System Market Size, by Military & Defense Organizations, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 135. Global Drone Data Link System Market Size, by Military & Defense Organizations, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Desider, Issue 199, June 2025 - Next-Generation Armed RPAS Protector Enters Service
   · Taxonomy evidence: The publication identifies the Royal Air Force as the operating defense customer for the remotely piloted program. This supports institutional buyer identity, not a supplier-market-share claim. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/685bf0de0433072fce0e1001/desider_-_issue_199__June_2025.pdf))
2. Congressional Record - Senate, February 5, 2024, Pages S356-S357: India MQ-9B Proposed-Sale Notification
   · Taxonomy evidence: The proposed purchaser is the Government of India for a defense aircraft program containing identified communications equipment; proposed procurement is not proof of realized link revenue. ([congress.gov](https://www.congress.gov/xx.xx/crec/2024/xx.xx/xx.xx/xx.xx/xx.xx/CREC-2024-xx.xx-xx.xx-pt1-PgS356-xx.xx.pdf))
3. U.S. Army UAS Interoperability - July 17, 2026
   · Taxonomy evidence: The publication establishes Army demand for unmanned-aircraft communications interfaces and associated ISR information exchange. ([army.mil](https://www.army.mil/article-amp/xx.xx/u_s_army_uas_interoperability))
4. Protector Enters Service with Royal Air Force - June 16, 2025
   · Taxonomy evidence: The Royal Air Force reports delivered ground-control stations and a remotely piloted aircraft program, directly identifying a defense operating customer. ([raf.mod.uk](https://www.raf.mod.uk/news/articles/protector-enters-service-with-royal-air-force/))

5. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
6. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

7. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
8. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
9. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
10. Motorola Solutions - March 2, 2026 Conference Transcript
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
11. Codan FY2025 Results - ASX Announcement, August 21, 2025
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
12. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.

13. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
14. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
15. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
16. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
17. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
18. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

19. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results

    · Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.

    · Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

20. Part 107 Waivers - Federal Aviation Administration

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.

    · Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

21. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))

22. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary

    · Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

23. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
24. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

25. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
26. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
27. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
28. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
29. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
30. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))

31. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.

12.2. Commercial Enterprises & Service Operators

Table 136. Global Drone Data Link System Market Size, by Commercial Enterprises & Service Operators, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 137. Global Drone Data Link System Market Size, by Commercial Enterprises & Service Operators, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 138. Global Drone Data Link System Market Size, by Commercial Enterprises & Service Operators, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Drones & Air Mobility Benefits for European Citizens and Air Transport - EASA

   · Taxonomy evidence: The regulator describes business use in media, agriculture, industrial monitoring, and security. ([easa.europa.eu](https://www.easa.europa.eu/en/domains/drones-air-mobility/drones-air-mobility-landscape/benefits))

2. Main Concepts and Definitions of Foreign Direct Investment - OECD Benchmark Definition of Foreign Direct Investment, Fifth Edition, 2025

   · Taxonomy evidence: Enterprises can be incorporated or unincorporated, and government- or household-owned quasi-corporations can be treated separately from their owners. Business-use classification therefore cannot rely only on public ownership or individual legal identity. ([oecd.org](https://www.oecd.org/en/publications/2025/xx.xx/oecd-benchmark-definition-of-foreign-direct-investment-fifth-edition_38a25baf/full-report/main-concepts-and-definitions-of-foreign-direct-investment_c3240e7d.html))

3. Glossary - Government at a Glance 2019, OECD

   · Taxonomy evidence: Public corporations are distinguished from general government, supporting placement of public commercial enterprises with commercial operating customers rather than automatically with civilian agencies. ([oecd.org](https://www.oecd.org/en/publications/government-at-a-glance-2019_8ccf5c38-en/full-report/component-xx.xx.html))

4. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
5. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

6. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
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   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
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    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.

13. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
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    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
16. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
17. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
18. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
19. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

20. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
21. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
22. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

23. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
24. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
25. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
26. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

27. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
28. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
29. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
30. Swisscom Broadcast and Nokia Build Joint Drone Network Across Switzerland
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.

12.3. Individual & Household Consumers

Table 139. Global Drone Data Link System Market Size, by Individual & Household Consumers, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 140. Global Drone Data Link System Market Size, by Individual & Household Consumers, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 141. Global Drone Data Link System Market Size, by Individual & Household Consumers, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Recreational Flyers & Community-Based Organizations - FAA

   · Taxonomy evidence: The publication expressly recognizes personal recreational drone flyers; household-consumer classification remains separate from organizational regulatory eligibility. ([faa.gov](https://www.faa.gov/uas/recreational_flyers))

2. Main Concepts and Definitions of Foreign Direct Investment - OECD Benchmark Definition of Foreign Direct Investment, Fifth Edition, 2025

   · Taxonomy evidence: Households are recognized institutional units distinct from legal and social entities; the taxonomy adapts this distinction to personal, nonbusiness drone-link consumption. ([oecd.org](https://www.oecd.org/en/publications/2025/xx.xx/oecd-benchmark-definition-of-foreign-direct-investment-fifth-edition_38a25baf/full-report/main-concepts-and-definitions-of-foreign-direct-investment_c3240e7d.html))

3. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China

   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.

4. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
5. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
6. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
7. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.

8. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
9. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
10. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
11. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
12. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
13. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
14. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))

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    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
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    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
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    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
20. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

21. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
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- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

22. Trends in International Arms Transfers, 2025 - SIPRI, March 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

23. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
24. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
25. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
26. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
27. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
28. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))

29. DJI O4 Air Unit Series - FAQ
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.
30. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.

12.4. Civilian Government & Public Institutions

Table 142. Global Drone Data Link System Market Size, by Civilian Government & Public Institutions, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 143. Global Drone Data Link System Market Size, by Civilian Government & Public Institutions, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 144. Global Drone Data Link System Market Size, by Civilian Government & Public Institutions, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Drones & Air Mobility Benefits for European Citizens and Air Transport - EASA

   · Taxonomy evidence: Law enforcement and rescue services are identified operating settings, supporting civilian public-service customers. ([easa.europa.eu](https://www.easa.europa.eu/en/domains/drones-air-mobility/drones-air-mobility-landscape/benefits))

2. National Uncrewed Systems Office - U.S. Geological Survey

   · Taxonomy evidence: The office conducts unmanned-aircraft research and data collection for USGS and Department of the Interior scientists, directly identifying civilian government users. ([usgs.gov](https://www.usgs.gov/programs/national-land-imaging-program/science/national-uncrewed-systems-office))

3. Glossary - Government at a Glance 2019, OECD

   · Taxonomy evidence: The glossary includes government-controlled nonmarket institutions in general government while excluding public corporations and government-owned quasi-corporations. This supports a control-and-economic-role rule for public institutions. ([oecd.org](https://www.oecd.org/en/publications/government-at-a-glance-2019_8ccf5c38-en/full-report/component-xx.xx.html))

4. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
5. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

6. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
7. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
8. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
9. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
10. Codan FY2025 Results - ASX Announcement, August 21, 2025
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
11. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
12. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.

13. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
14. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
15. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
16. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
17. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
18. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
19. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

20. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
21. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
22. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

23. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
24. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
25. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
26. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

27. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
28. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
29. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))

12.5. Nonprofit Institutions

Table 145. Global Drone Data Link System Market Size, by Nonprofit Institutions, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 146. Global Drone Data Link System Market Size, by Nonprofit Institutions, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 147. Global Drone Data Link System Market Size, by Nonprofit Institutions, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. IFRC Drones Group

· Taxonomy evidence: The IFRC Drones Group identifies National Societies, the Federation Secretariat, and ICRC participants using or developing drone applications for humanitarian programs. This supports an organizational user setting, not separately disclosed link purchases. (drones.preparecenter.org)

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.

2. Conceptual Framework - OECD Handbook on the Compilation of Household Distributional Results on Income, Consumption and Saving in Line with National Accounts Totals, 2024

· Taxonomy evidence: Nonprofit institutions serving households are recognized separately from government, corporations, and households, supporting an independent nonmarket nonprofit buyer branch. ([oecd.org](https://www.oecd.org/en/publications/oecd-handbook-on-the-compilation-of-household-distributional-results-on-income-consumption-and-saving-in-line-with-national-accounts-totals_5a3b9119-en/full-report/component-xx.xx.html))

3. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China

· Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.

4. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
5. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
6. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
7. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.

8. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
9. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
10. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
11. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
12. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
13. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
14. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))

15. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
16. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
17. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
18. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
19. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
20. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

21. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

22. Trends in International Arms Transfers, 2025 - SIPRI, March 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

23. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
24. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
25. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
26. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
27. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
28. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))

13. Drone Data Link System Market, by Deployment Model

[illegible] A buyer seeking customer-managed control should verify administrative rights, authority over network relationships and retained support duties. This preserves direct control only when the customer has the contractual rights and organizational capability to exercise it; an installed terminal or local console is not sufficient evidence.

Provider-Managed Networks can consolidate specific continuing duties. The Galaxy xx.xx and Viasat collaboration announced March xx.xx 2026 describes provisioning, billing, monitoring and lifecycle coordination for Velaris delivery. [illegible]

Hybrid Network Management remains a distinct included arrangement in which substantive management responsibilities are divided. [illegible] A proposed hybrid arrangement therefore needs a documented responsibility and change-control allocation before it can be treated as an executable commercial alternative.

Figure 24. Global Drone Data Link System Market, by Deployment Model: Market share evolution, 2025-2032

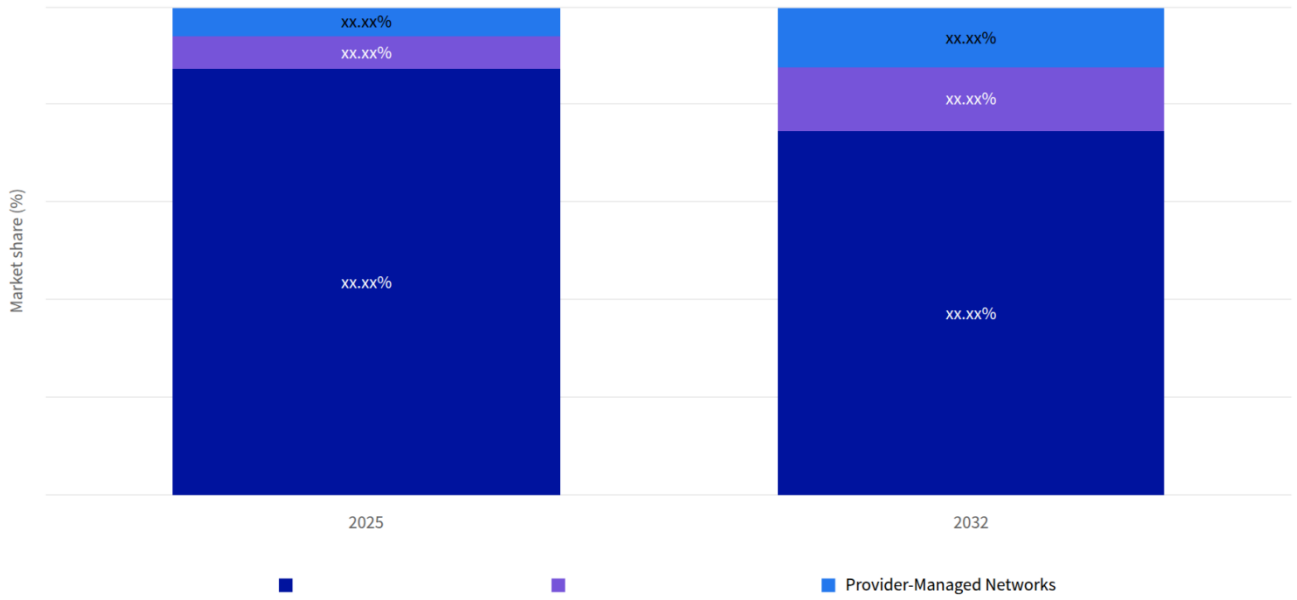

Figure 25. Global Drone Data Link System Market, by Deployment Model: Market size by category, 2025

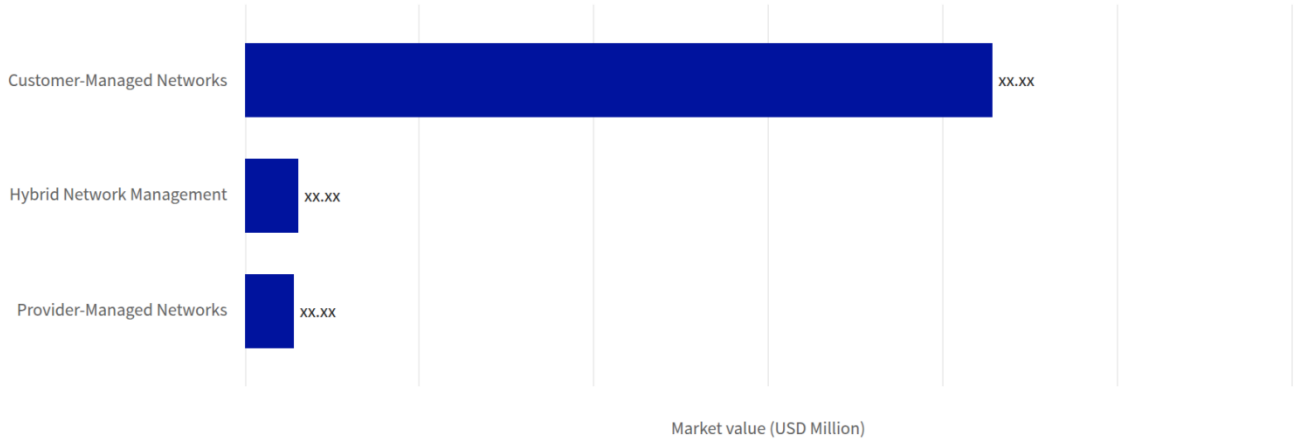

Figure 26. Global Drone Data Link System Market, by Deployment Model: Market size and growth, 2025-2032

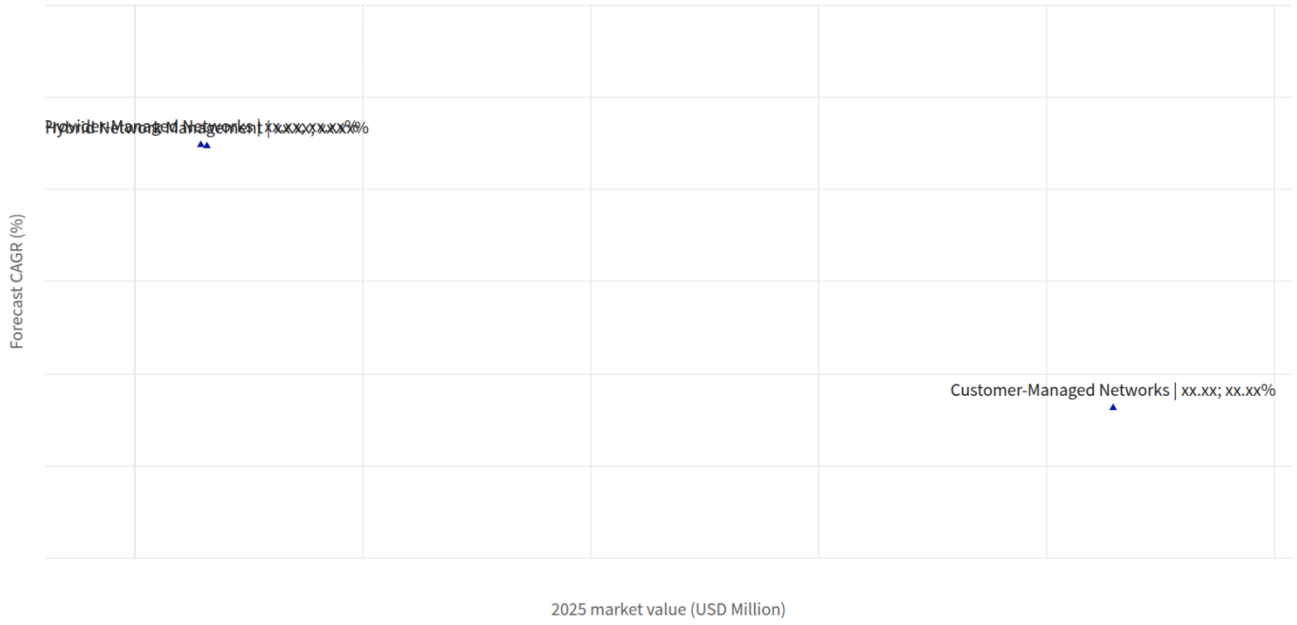

Table 148. Global Drone Data Link System Market, by Deployment Model growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Customer-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Provider-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 149. Global Drone Data Link System Market Size, by Deployment Model, 2017-2032 (USD Million)

Deployment Model	2023	2024	2025	2026	2027	2032	CAGR (%)
Customer-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Provider-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Halo: Commercial Drone Connectivity Platform for BVLOS Operations

   · Elsight offers cloud-based and on-premises management options; hosting location alone does not establish contractual network control. ([elsight.com](https://www.elsight.com/products/halo-for-commercial-use/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.

2. Galaxy 1 partners with Viasat to deliver rapid, scalable and secure communications for uncrewed aircraft

   · The March xx.xx 2026 Galaxy xx.xx and Viasat announcement describes provisioning, billing, monitoring and lifecycle coordination for Velaris delivery. ([viasat.com](https://www.viasat.com/news/latest-news/aviation/2026/galaxy-xx.xx-partners-with-viasat/))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March 2026 collaboration names provisioning, billing, monitoring and lifecycle duties, supporting a provider-management commercial premise without disclosing penetration.

3. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026

   · The published external-service provisions call for allocation of operator-provider roles and responsibilities; they do not establish a named hybrid-management contract. ([easa.europa.eu](https://www.easa.europa.eu/en/document-library/easy-access-rules/online-publications/easy-access-rules-unmanned-aircraft-systems?erules-id=ERULES-xx.xx-xx.xx))

   · Taxonomy evidence: The June 2026 compilation includes provisions for externally supplied services and allocation of responsibilities between the UAS operator and service providers. These support a responsibility-based deployment axis but are not a universal global contract classification. ([easa.europa.eu](https://www.easa.europa.eu/en/document-library/easy-access-rules/online-publications/easy-access-rules-unmanned-aircraft-systems?erules-id=ERULES-xx.xx-xx.xx))

   · Taxonomy evidence: The external-services provisions require allocation of roles and responsibilities between the UAS operator and external providers.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.

4. ISO 21384-3:2026 - Uncrewed aircraft systems - Part 3: Operational procedures

   · Taxonomy evidence: The public definitions identify a C2 communications provider as an entity supplying some or all of the link service and define an enforceable service agreement covering provider obligations.

5. Nigeria Civil Aviation Regulations 2023 - Part 21: Remotely Piloted Aircraft System

   · Taxonomy evidence: Section xx.xx.xx.xx distinguishes full operator control from provider control over part or all of a C2 link, with responsibilities documented through agreements.

6. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China

   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.

7. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
8. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
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    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
12. Codan FY2025 Results - ASX Announcement, August 21, 2025
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
13. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
14. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.

15. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
16. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
17. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
18. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
19. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
20. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

21. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
22. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
23. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

13.1. Customer-Managed Networks

Table 150. Global Drone Data Link System Market Size, by Customer-Managed Networks, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 151. Global Drone Data Link System Market Size, by Customer-Managed Networks, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 152. Global Drone Data Link System Market Size, by Customer-Managed Networks, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Nigeria Civil Aviation Regulations 2023 - Part 21: Remotely Piloted Aircraft System
   - Taxonomy evidence: Entirely operator-controlled C2 links are expressly recognized.

2. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
3. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
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   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares.
([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares.
([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

4. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
5. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
19. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

20. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
21. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

22. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
23. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
24. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
25. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
26. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
27. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))

28. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.

13.2. Hybrid Network Management

Table 153. Global Drone Data Link System Market Size, by Hybrid Network Management, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 154. Global Drone Data Link System Market Size, by Hybrid Network Management, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 155. Global Drone Data Link System Market Size, by Hybrid Network Management, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026, EASA

   · Taxonomy evidence: Allocation of operator-provider responsibilities supplies a basis for analyzing shared arrangements; the publication does not establish a named commercial agreement dividing substantive network-management functions. ([easa.europa.eu](https://www.easa.europa.eu/en/document-library/easy-access-rules/online-publications/easy-access-rules-unmanned-aircraft-systems?erules-id=ERULES-xx.xx-xx.xx))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.

2. ISO 21384-3:2026 - Uncrewed aircraft systems - Part 3: Operational procedures

   · Taxonomy evidence: The provider definition permits partial service provision, furnishing a standards basis for separately allocating responsibility; it does not prescribe this taxonomy's hybrid label.

3. Nigeria Civil Aviation Regulations 2023 - Part 21: Remotely Piloted Aircraft System

   · Taxonomy evidence: Provider control over only part of a link is also recognized, supporting the category basis without establishing a named shared-management commercial contract.

4. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
5. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

6. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
7. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
8. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
9. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
10. Codan FY2025 Results - ASX Announcement, August 21, 2025
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
11. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
12. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.

13. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
14. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
15. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
16. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
17. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
18. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
19. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

20. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
21. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
22. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

23. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
24. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
25. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
26. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

27. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
28. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
29. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
30. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.

13.3. Provider-Managed Networks

Table 156. Global Drone Data Link System Market Size, by Provider-Managed Networks, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 157. Global Drone Data Link System Market Size, by Provider-Managed Networks, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 158. Global Drone Data Link System Market Size, by Provider-Managed Networks, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026, EASA
   - Taxonomy evidence: Externally provided services necessary to the intended flight are explicitly recognized. This corroborates external service provision without proving that every provider manages the entire communications network. ([easa.europa.eu](https://www.easa.europa.eu/en/document-library/easy-access-rules/online-publications/easy-access-rules-unmanned-aircraft-systems?erules-id=ERULES-xx.xx-xx.xx))
   - Taxonomy evidence: The publication recognizes externally provided services necessary for flight safety and requires their performance to suit the intended operation.
2. ISO 21384-3:2026 - Uncrewed aircraft systems - Part 3: Operational procedures
   - Taxonomy evidence: C2 communications providers are included among external services supporting UAS operations.
3. Nigeria Civil Aviation Regulations 2023 - Part 21: Remotely Piloted Aircraft System
   - Taxonomy evidence: The regulation recognizes provider operational control over the entire C2 link.
4. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.

5. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
6. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
7. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
8. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.

9. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
10. Codan FY2025 Results - ASX Announcement, August 21, 2025
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
11. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
12. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
13. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
14. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

15. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
16. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
17. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
18. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
19. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

20. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
21. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
22. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

23. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
24. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
25. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
26. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

27. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
28. Declaração de Conformidade para Uso Próprio - Anatel
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes.
([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes.
([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
29. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator.
([faa.gov](https://www.faa.gov/media/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator.
([faa.gov](https://www.faa.gov/media/xx.xx))
30. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March 2026 collaboration names provisioning, billing, monitoring and lifecycle duties, supporting a provider-management commercial premise without disclosing penetration.

14. Drone Data Link System Market, by Sales Channel

[illegible] The same originating supplier can therefore reach a buyer through different commercial relationships. Under Supplier-Direct Sales, the buyer should establish the manufacturer's own delivery and support commitments; intermediary participation does not by itself identify the seller of record or prove that an originating supplier's sale has become a separate resale.

[illegible] Authorized retail can provide an acceptable supported route; supplier-direct purchasing is an alternative when the buyer needs a direct commercial relationship. Neither route independently establishes aircraft acceptance or operating permission.

Value-Added Reseller and Integrator Sales are defensible where the intermediary contributes duties the buyer would otherwise coordinate. Galaxy xx.xx's announced Velaris role includes provisioning, billing and lifecycle coordination rather than traditional distribution alone. [illegible]

Figure 27. Global Drone Data Link System Market, by Sales Channel: Market share evolution, 2025-2032

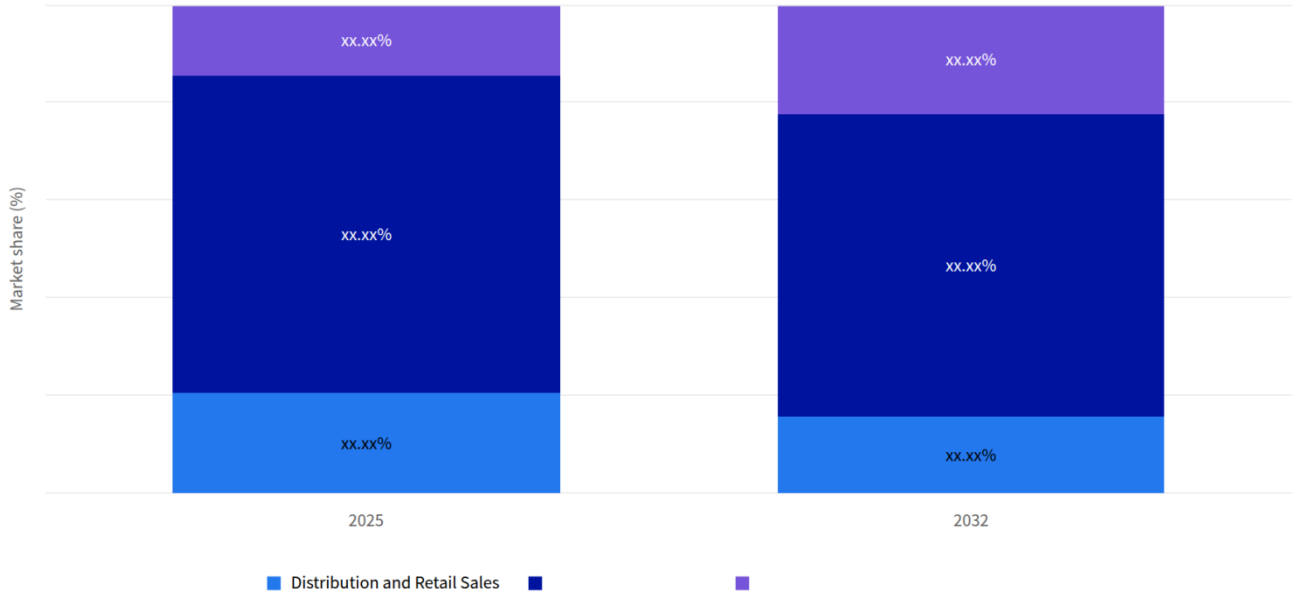

Figure 28. Global Drone Data Link System Market, by Sales Channel: Market size by category, 2025

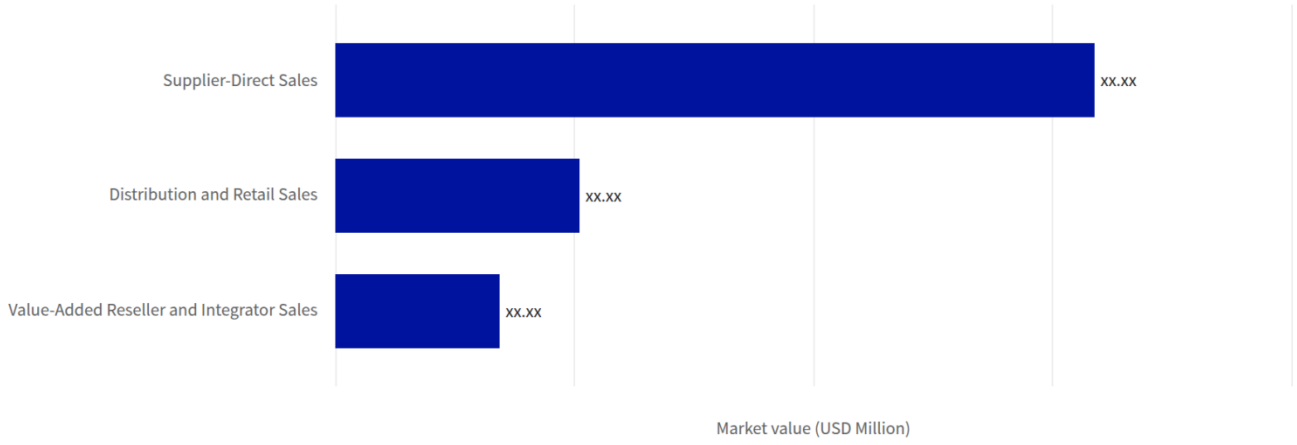

Figure 29. Global Drone Data Link System Market, by Sales Channel: Market size and growth, 2025-2032

Table 159. Global Drone Data Link System Market, by Sales Channel growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Distribution and Retail Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supplier-Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Value-Added Reseller and Integrator Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 160. Global Drone Data Link System Market Size, by Sales Channel, 2017-2032 (USD Million)

Sales Channel	2023	2024	2025	2026	2027	2032	CAGR (%)
Distribution and Retail Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supplier-Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Value-Added Reseller and Integrator Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Galaxy 1 partners with Viasat to deliver rapid, scalable and secure communications for uncrewed aircraft
   - Galaxy xx.xx's announced role goes beyond traditional distribution through continuing provisioning and service coordination. ([viasat.com](https://www.viasat.com/news/latest-news/aviation/2026/galaxy-xx.xx-partners-with-viasat/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 announcement assigns provisioning, billing and integration responsibilities, supporting a managed value-added channel mechanism without measured penetration.
2. Statement: Spectrum for Unmanned Aircraft Systems (UAS)
   - Ofcom requires relevant network-operator agreement for covered mobile and satellite use, supporting the distinction between intermediary coordination and network permission. ([ofcom.org.uk](https://www.ofcom.org.uk/spectrum/radio-equipment/spectrum-for-unmanned-aircraft-systems))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An intermediary cannot independently grant network permission, limiting the forecast transfer of customer obligations.
3. Where To Buy
   - DJI distinguishes official and authorized channels and excludes unauthorized-dealer purchases from its warranty services. ([dji.com](https://www.dji.com/where-to-buy/online-retails))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
4. Doodle Labs announces launch of Reseller Program
   - Doodle Labs' UAV-facing reseller program includes distributors, value-added resellers and systems integrators. ([doodlelabs.com](https://doodlelabs.com/blog/announces-launch-of-reseller-program))
   - Taxonomy evidence: The November xx.xx 2023 channel-program announcement expressly addresses UAV-facing communications and names distributors, value-added resellers, and systems integrators.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
5. OneGov IT - GSA IT Vendor Management Office
   - Taxonomy evidence: GSA distinguishes OEM prime-contract relationships from reseller participation and separately discusses professional-service contracts. This is an independent cross-market framework for seller-role classification, not proof of drone-specific channel shares. ([itvmo.gsa.gov](https://itvmo.gsa.gov/onegov/))

6. OneGov IT - IT Vendor Management Office
   - Taxonomy evidence: The procurement FAQs distinguish originating manufacturers' prime-contract role from reseller and integrator participation, supplying a cross-market seller-role classification.
7. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
8. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
9. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
10. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
11. Telemetry Radios - Holybro Store
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.
12. Motorola Solutions - March 2, 2026 Conference Transcript
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.

13. Codan FY2025 Results - ASX Announcement, August 21, 2025
· Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
14. Codan H1 FY2026 Investor Presentation - February 19, 2026
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
· Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
15. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
16. Elsight Limited - Appendix 4E and Annual Report 2025
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
17. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
18. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
· Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
19. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
· Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
20. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
· Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

21. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
22. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
23. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
24. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
25. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.

14.1. Supplier-Direct Sales

Table 161. Global Drone Data Link System Market Size, by Supplier-Direct Sales, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 162. Global Drone Data Link System Market Size, by Supplier-Direct Sales, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 163. Global Drone Data Link System Market Size, by Supplier-Direct Sales, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. OneGov IT - GSA IT Vendor Management Office
   - Taxonomy evidence: An OEM can remain the prime supplier while value-added firms perform supporting functions. Supporting intermediary participation therefore does not by itself reclassify the originating supplier's sale as intermediary resale. ([itvmo.gsa.gov](https://itvmo.gsa.gov/onegov/))
2. OneGov IT - IT Vendor Management Office
   - Taxonomy evidence: An OEM can remain prime contractor while other firms provide supporting functions; subcontractor participation alone does not establish an intermediary sale.

3. VERSITRON Introduces NDAA-Compliant Tethered Drone Fiber Optic Converters for Secure Airborne Communications
   - Taxonomy evidence: The June xx.xx 2026 announcement directs purchasers to contact the manufacturer for pricing and product supply, establishing a direct commercial route.
4. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
   ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
   ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
5. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares.
   ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares.
   ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

6. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
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   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
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   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
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    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.

12. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
13. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
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    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
15. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
16. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
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    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

18. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results

    · Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.

    · Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

19. Part 107 Waivers - Federal Aviation Administration

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.

    · Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

20. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))

21. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary

    · Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

22. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
23. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

24. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
25. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
26. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
27. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
28. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
29. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))

30. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
31. Where To Buy - DJI
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.

14.2. Distribution and Retail Sales

Table 164. Global Drone Data Link System Market Size, by Distribution and Retail Sales, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 165. Global Drone Data Link System Market Size, by Distribution and Retail Sales, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 166. Global Drone Data Link System Market Size, by Distribution and Retail Sales, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Doodle Labs announces launch of Reseller Program
   - Taxonomy evidence: Distributors are explicitly identified as eligible partners for the supplier's worldwide communications reseller program.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.

2. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
3. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

4. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
5. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
6. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
7. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
8. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
9. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
10. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.

11. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
12. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
13. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
14. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
15. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
16. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
17. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

18. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
19. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
20. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

21. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
22. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
23. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
24. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

25. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
26. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
27. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
28. Where To Buy - DJI
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.

14.3. Value-Added Reseller and Integrator Sales

Table 167. Global Drone Data Link System Market Size, by Value-Added Reseller and Integrator Sales, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 168. Global Drone Data Link System Market Size, by Value-Added Reseller and Integrator Sales, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 169. Global Drone Data Link System Market Size, by Value-Added Reseller and Integrator Sales, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. OneGov IT - GSA IT Vendor Management Office

   · Taxonomy evidence: Integration, engineering, logistics, and compliance are identified value-added roles. Whether a particular drone-link integrator is the intermediary seller, originating supplier, or subcontractor still requires transaction evidence. ([itvmo.gsa.gov](https://itvmo.gsa.gov/onegov/))

2. OneGov IT - IT Vendor Management Office
   - Taxonomy evidence: Value-added resellers and integrators provide engineering, integration, logistics, compliance, and mission support. This establishes the intermediary role, not a drone-specific revenue allocation.
3. Doodle Labs announces launch of Reseller Program
   - Taxonomy evidence: Value-added resellers and systems integrators are explicitly identified as channel partners for UAV-facing communications products; their individual contractual roles require transaction evidence.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
4. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
     ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
     ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.

5. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
6. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
7. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
8. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.

9. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
10. Codan FY2025 Results - ASX Announcement, August 21, 2025
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
11. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
12. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
13. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
14. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
15. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))

16. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
17. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
18. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
19. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
20. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
21. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

22. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
23. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

24. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
25. Civil Aviation Safety Authority Annual Report 2024-25
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
26. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
27. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
28. Declaração de Conformidade para Uso Próprio - Anatel
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
29. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))

30. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 announcement assigns provisioning, billing and integration responsibilities, supporting a managed value-added channel mechanism without measured penetration.
31. Statement: Spectrum for Unmanned Aircraft Systems - Ofcom
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An intermediary cannot independently grant network permission, limiting the forecast transfer of customer obligations.

15. Drone Data Link System Market, by Operating Envelope

[redacted] The FAA states that a waiver is unnecessary when all applicable Part xx.xx rules are met, while identifying visual-line-of-sight departures among operations requiring a waiver. A long-range radio claim therefore does not establish a BVLOS procurement requirement, and a visual-line-of-sight deployment should not automatically be treated as approval-free.

Beyond-Visual-Line-of-Sight Deployments introduce a separate authorization-dependent commitment. For applicable U.S. small-UAS operations, the FAA provides a Part xx.xx waiver route. [redacted]

Buyers should commit to deployment-dependent communications services only after identifying the actual operating permission and its conditions. [redacted] That separation may delay a broader rollout, but avoids treating an application pathway or a supplier capability claim as an approved mission schedule.

Figure 30. Global Drone Data Link System Market, by Operating Envelope: Market share evolution, 2025-2032

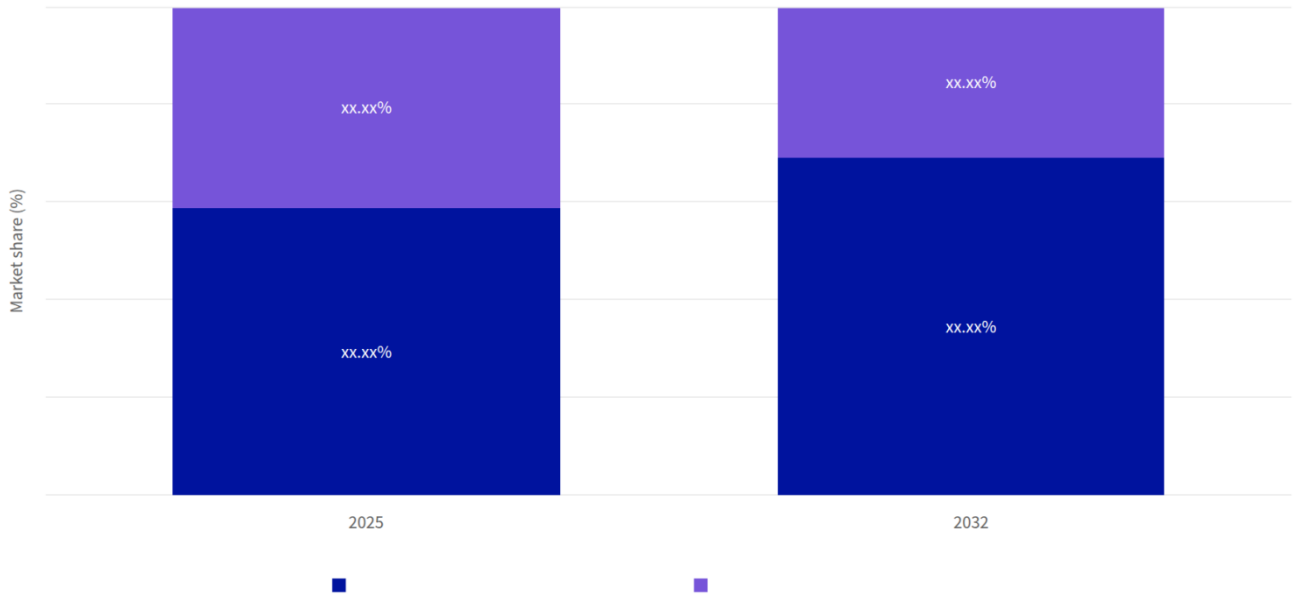

Figure 31. Global Drone Data Link System Market, by Operating Envelope: Market size by category, 2025

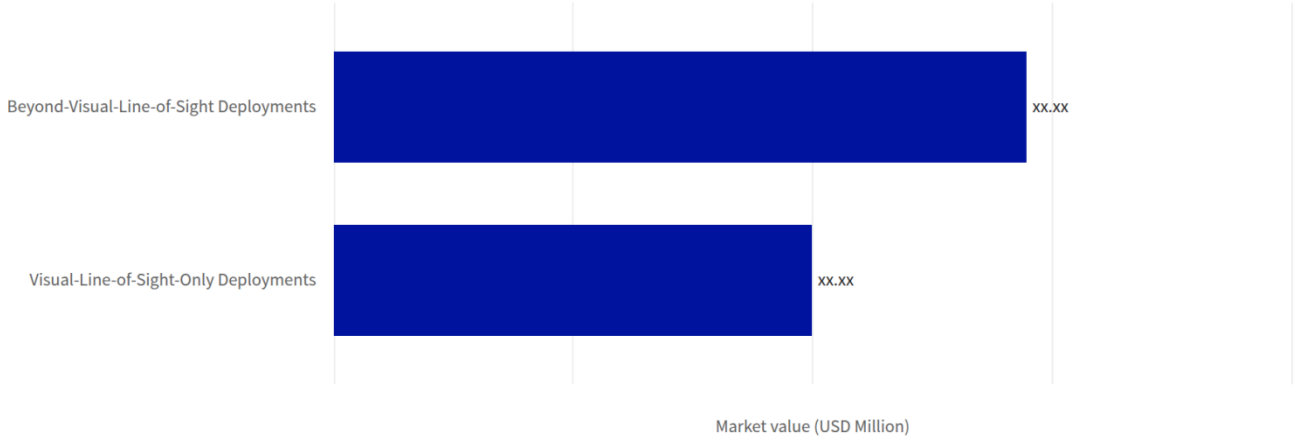

Table 170. Global Drone Data Link System Market, by Operating Envelope growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Beyond-Visual-Line-of-Sight Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visual-Line-of-Sight-Only Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 171. Global Drone Data Link System Market Size, by Operating Envelope, 2017-2032 (USD Million)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Beyond-Visual-Line-of-Sight Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visual-Line-of-Sight-Only Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Part 107 Waivers

   · The FAA identifies visual-line-of-sight departures among waivable Part xx.xx operations and states that compliant operations do not need a waiver. ([faa.gov](https://www.faa.gov/uas/commercial_operators/part_107_waivers))

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.

   · Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.

2. 2025 Summary of changes to Canada's drone regulations

   · Canada's lower-risk BVLOS rules became applicable November xx.xx 2025; relevant pilot credentials and an RPAS Operator Certificate are required. The framework separately identifies extended visual-line-of-sight operations. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.

3. UAS Operator Radio Licence Guidance
   - Ofcom's guidance separates radio permission from aviation authorization. ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/manage-your-licence/aeronautical/guidance/uas-operator-radio-licence-guidance.pdf?v=xx.xx))
   - Taxonomy evidence: The guidance expressly separates radio authorization from aviation authorization. Spectrum permission cannot independently verify a VLOS or BVLOS deployment's flight approval. ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/manage-your-licence/aeronautical/guidance/uas-operator-radio-licence-guidance.pdf?v=xx.xx))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
4. Frequently Used Terms - ICAO
   - Taxonomy evidence: The international terminology defines VLOS through direct unaided visual contact rather than a radio-range threshold.
5. 2. Development of UAS Regulation - ICAO UAS Toolkit
   - Taxonomy evidence: The UAS regulatory guidance distinguishes VLOS-only operating limitations from operations involving BVLOS; the sample regulatory framework is not presented as a universal national law.
6. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
7. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
8. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
9. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.

10. Telemetry Radios - Holybro Store
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
11. Motorola Solutions - March 2, 2026 Conference Transcript
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
12. Codan FY2025 Results - ASX Announcement, August 21, 2025
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
13. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
14. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
15. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
16. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
17. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
18. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

19. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

20. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

21. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
- Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

22. CY 2024 Small Unmanned Aircraft Systems Survey Report
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.

15.1. Beyond-Visual-Line-of-Sight Deployments

Table 172. Global Drone Data Link System Market Size, by Beyond-Visual-Line-of-Sight Deployments, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 173. Global Drone Data Link System Market Size, by Beyond-Visual-Line-of-Sight Deployments, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 174. Global Drone Data Link System Market Size, by Beyond-Visual-Line-of-Sight Deployments, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. SkyLine UAS Command & Control - C2 for BVLOS
   - Taxonomy evidence: The supplier expressly markets its communications ecosystem to support BVLOS deployment requirements. The page does not independently establish flight approval or sales for every configuration.

2. 2. Development of UAS Regulation - ICAO UAS Toolkit
   - Taxonomy evidence: The guidance notes that BVLOS operations can include VLOS launch and recovery, supporting classification of the complete intended deployment rather than overlapping flight-phase peers.
3. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
     ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
     ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
4. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
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   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares.
     ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares.
     ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

5. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
6. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
7. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
8. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
9. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
10. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
11. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.

12. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
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    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
14. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
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    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

18. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
19. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
20. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

21. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

22. Trends in International Arms Transfers, 2025 - SIPRI, March 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

23. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
24. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
25. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
26. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
27. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
28. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))

29. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
30. UAS Operator Radio Licence Guidance - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.

15.2. Visual-Line-of-Sight-Only Deployments

Table 175. Global Drone Data Link System Market Size, by Visual-Line-of-Sight-Only Deployments, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 176. Global Drone Data Link System Market Size, by Visual-Line-of-Sight-Only Deployments, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 177. Global Drone Data Link System Market Size, by Visual-Line-of-Sight-Only Deployments, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Frequently Used Terms - ICAO
   - Taxonomy evidence: The VLOS definition recognizes visual contact maintained by the remote pilot or an RPA observer, supporting a visual-contact category while leaving local deployment conventions to be established.
2. 2. Development of UAS Regulation - ICAO UAS Toolkit
   - Taxonomy evidence: VLOS-only operation is explicitly identified as an operating limitation in the sample categorization.

3. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
4. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

5. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
6. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
7. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
8. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
9. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
10. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
11. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.

12. Elsight Limited - Appendix 4E and Annual Report 2025

· Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.

13. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1

· Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

14. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025

· Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))

15. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine

· Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

16. The Drone Databook - Center for the Study of the Drone at Bard College, 2019

· Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.

· Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

17. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results

· Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.

· Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

18. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
19. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
20. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

21. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

22. Trends in International Arms Transfers, 2025 - SIPRI, March 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

23. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
24. Civil Aviation Safety Authority Annual Report 2024-25
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
25. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
26. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
27. Declaração de Conformidade para Uso Próprio - Anatel
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
28. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))

16. Drone Data Link System Market, by Spectrum Access

Spectrum Access changes the counterparty and permission evidence required before a radio offering is usable. Ofcom distinguishes generally exempt drone equipment from equipment covered by its UAS operator radio license and retains network-consent conditions for covered mobile and satellite use. ■■■■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■ ■ ■■■■■■■■■ ■■■■■■ ■■■ ■■ ■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■ ■■■■■ ■■■■■■■■■■■■■■■

Mixed Spectrum Authorization must be distinguished from the mere presence of several communications technologies. ■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■ ■■■■ ■■ ■■■■■ ■■■■■■■■ ■■■■ ■■■■■ ■■ ■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■ ■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■ ■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■ ■■■■■■■ ■■ ■ ■■■■■■■■ ■■■■■■■■ Adding bearers broadens the permission relationships that must be resolved; it does not itself establish destination access.

■■■■■■■■■ ■■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■■■ ■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■ ■■■■ ■ ■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ A non-radio communications contribution avoids treating that medium as an RF access requirement, but does not remove aircraft or mission authorization, or permissions for any accompanying radio functions. Buyers should evaluate a tethered alternative only where the mission permits the ground connection and aircraft compatibility is confirmed; mobility-dependent missions favor a different qualified offering.

Figure 32. Global Drone Data Link System Market, by Spectrum Access: Market share evolution, 2025-2032

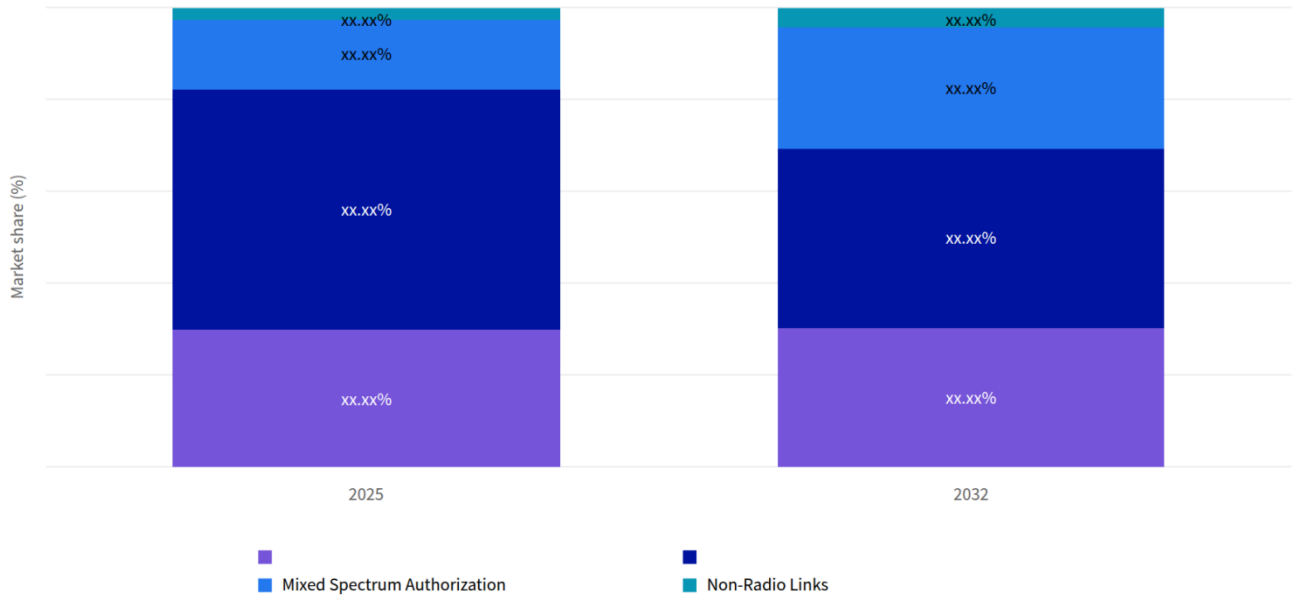

Figure 33. Global Drone Data Link System Market, by Spectrum Access: Market size by category, 2025

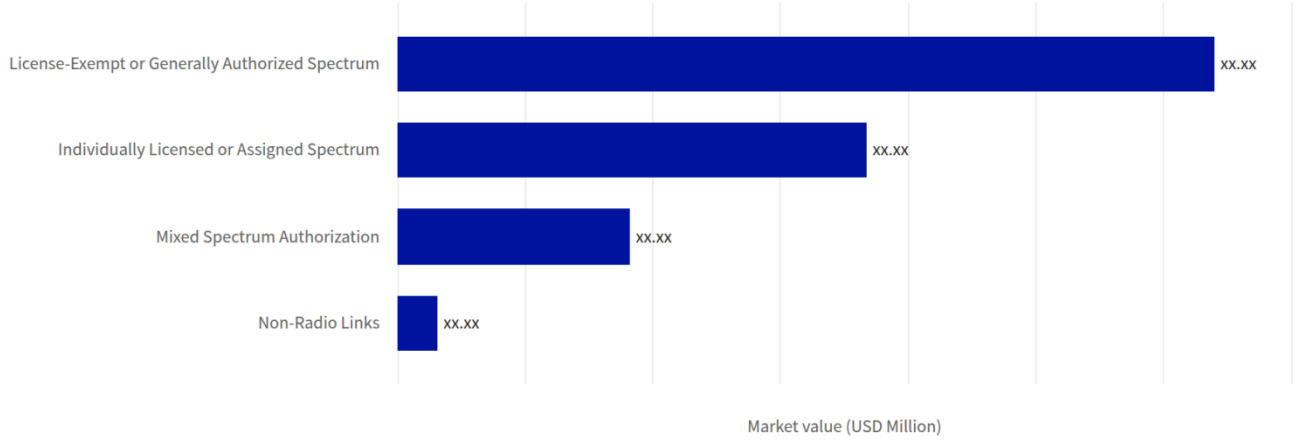

Figure 34. Global Drone Data Link System Market, by Spectrum Access: Market size and growth, 2025-2032

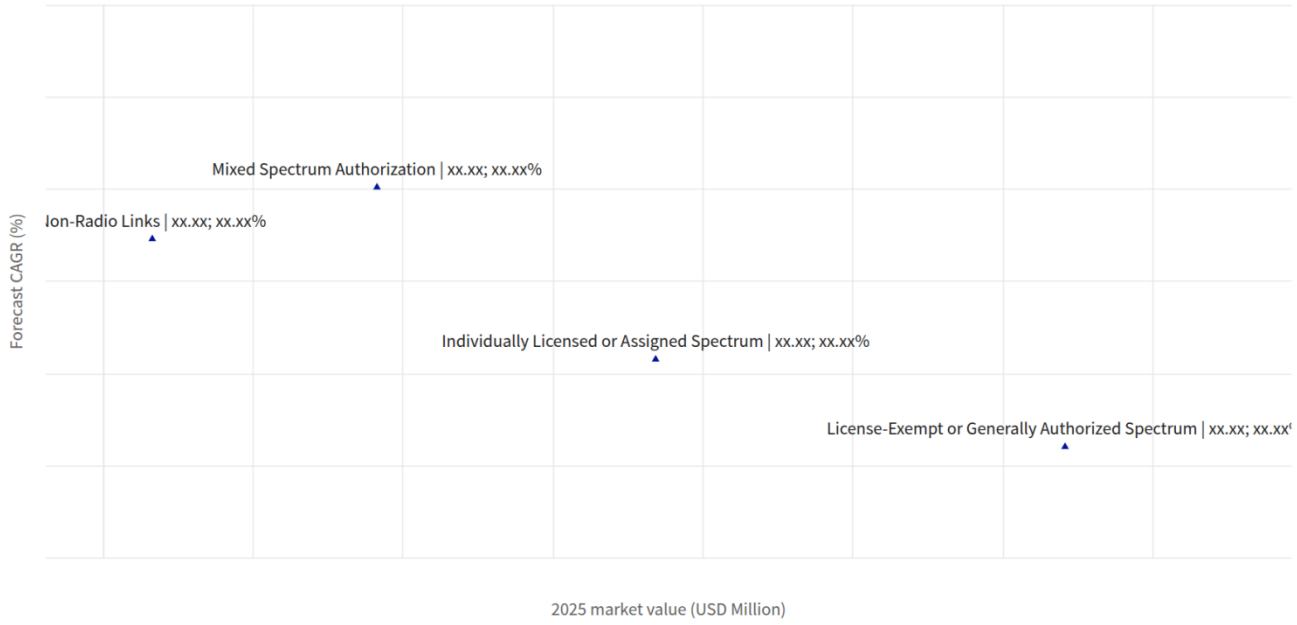

Table 178. Global Drone Data Link System Market, by Spectrum Access growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Individually Licensed or Assigned Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
License-Exempt or Generally Authorized Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mixed Spectrum Authorization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 179. Global Drone Data Link System Market Size, by Spectrum Access, 2017-2032 (USD Million)

Spectrum Access	2023	2024	2025	2026	2027	2032	CAGR (%)
Individually Licensed or Assigned Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
License-Exempt or Generally Authorized Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mixed Spectrum Authorization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
   - Halo is marketed with cellular, radio and satellite connectivity; the portfolio does not establish destination-specific spectrum permission. ([elsight.com](https://www.elsight.com/products/halo-for-commercial-use/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
2. Safe-T Drone Power Station
   - Elistair markets Safe-T as a tethered offering with an optical-fiber option and offering-specific aircraft compatibility considerations; mission suitability remains conditional on the ground connection. ([elistair.com](https://elistair.com/solutions/tethering-station-safe-t/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
3. Operational Authorisation
   - Specific-category aircraft operations remain subject to applicable authorization, independently of the included communications medium. ([easa.europa.eu](https://www.easa.europa.eu/en/domains/drones-air-mobility/operating-drone/specific-category-civil-drones/operational-authorisation))

4. UAS Operator Radio Licence Guidance
   - The guidance distinguishes exempt equipment from UAS operator-license equipment and retains relevant network-consent requirements. ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/manage-your-licence/aeronautical/guidance/uas-operator-radio-licence-guidance.pdf?v=xx.xx))
   - Taxonomy evidence: Ofcom distinguishes generally exempt drone radio equipment from equipment covered by a UAS operator radio license. The guidance also distinguishes terrestrial mobile-terminal exemption from the authorization required for airborne mobile use. This supports jurisdiction-specific allocation rather than a universal license status inferred from bearer name. ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/manage-your-licence/aeronautical/guidance/uas-operator-radio-licence-guidance.pdf?v=xx.xx))
   - Taxonomy evidence: The guidance distinguishes drone equipment operating under license exemption from equipment requiring a UAS operator radio license. It separately states that radio authorization does not replace aviation requirements.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
5. Class licences
   - ACMA class licenses authorize specified common equipment without an individual application and require compliance with their conditions. The page distinguishes terminals from licensed base and space stations. ([acma.gov.au](https://www.acma.gov.au/class-licences))
   - Taxonomy evidence: Class authorization is contrasted with individually assigned apparatus permission, demonstrating that the global taxonomy must normalize differing legal terminology rather than equate every license with individual authorization.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
6. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
   - Taxonomy evidence: NIST's current UAS communications portfolio distinguishes licensed cellular communications from unlicensed communications in its public-safety research. This supplies independent drone-specific support for permission-class distinctions, not legal clearance of a particular deployment. ([nist.gov](https://www.nist.gov/ctl/pscr/research-portfolios/uncrewed-aircraft-systems))
7. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026, EASA
   - Taxonomy evidence: The C2 communications provisions separately address applicable radio-equipment and RF-spectrum requirements.

8. VERSITRON Introduces NDAA-Compliant Tethered Drone Fiber Optic Converters for Secure Airborne Communications
   - Taxonomy evidence: The announced offering supplies a hardwired optical communications path between airborne and ground equipment rather than an RF link.
9. Five-year spectrum outlook 2023-28 - Australian Communications and Media Authority
   - Taxonomy evidence: The 2023-2028 outlook expressly discusses spectrum and licensing arrangements for commercial and consumer drones, establishing a drone-specific regulatory category basis.
10. Radio Regulations: Organization and Main Concepts - ITU Regional Radiocommunication Seminar
    - Taxonomy evidence: The regulatory presentation distinguishes telecommunications using wire, radio, or optical systems and defines radiocommunication specifically through radio waves.
11. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
12. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
    - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
13. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
14. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
15. Telemetry Radios - Holybro Store
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
16. Motorola Solutions - March 2, 2026 Conference Transcript
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.

17. Codan FY2025 Results - ASX Announcement, August 21, 2025
- Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.

18. Codan H1 FY2026 Investor Presentation - February 19, 2026
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.

19. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.

20. Elsight Limited - Appendix 4E and Annual Report 2025
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.

21. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

22. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.

23. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
- Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

24. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

25. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
26. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
27. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
28. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
29. Defence Procurement Agency DOT - Official Post on Fiber-Optic Drone Procurement and 2025 Deliveries
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.

16.1. License-Exempt or Generally Authorized Spectrum

Table 180. Global Drone Data Link System Market Size, by License-Exempt or Generally Authorized Spectrum, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 181. Global Drone Data Link System Market Size, by License-Exempt or Generally Authorized Spectrum, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 182. Global Drone Data Link System Market Size, by License-Exempt or Generally Authorized Spectrum, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
   · Taxonomy evidence: The portfolio independently recognizes unlicensed drone communications alongside licensed alternatives; research recognition does not verify every product's airborne-use compliance. ([nist.gov](https://www.nist.gov/ctl/pscr/research-portfolios/uncrewed-aircraft-systems))

2. UAS Operator Radio Licence Guidance - Ofcom
   - Taxonomy evidence: A drone using only exempt radio equipment does not require this individual UAS radio license, subject to the exemption's applicable conditions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
3. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026, EASA
   - Taxonomy evidence: Unlicensed bands are explicitly recognized as a possible C2-link spectrum setting.
4. Class licences - Australian Communications and Media Authority
   - Taxonomy evidence: Class licenses authorize common equipment on shared frequencies without an individual application or fee, supporting the generally authorized peer.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
5. Five-year spectrum outlook 2023-28 - Australian Communications and Media Authority
   - Taxonomy evidence: The outlook identifies the low-interference-potential-devices class license as supporting drone use cases. This is dated category evidence, not verification of every current deployment's compliance.
6. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
     ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
     ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.

7. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
8. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
9. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
10. Telemetry Radios - Holybro Store
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.

11. Motorola Solutions - March 2, 2026 Conference Transcript
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
12. Codan FY2025 Results - ASX Announcement, August 21, 2025
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
13. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
14. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
15. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
16. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
17. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))

18. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
· Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
19. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
· Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
20. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
· Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
21. Part 107 Waivers - Federal Aviation Administration
· Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
· Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
22. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
· Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
23. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
· Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

24. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
25. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

26. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
27. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
28. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
29. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
30. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
31. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))

16.2. Individually Licensed or Assigned Spectrum

Table 183. Global Drone Data Link System Market Size, by Individually Licensed or Assigned Spectrum, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 184. Global Drone Data Link System Market Size, by Individually Licensed or Assigned Spectrum, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 185. Global Drone Data Link System Market Size, by Individually Licensed or Assigned Spectrum, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Uncrewed Aircraft Systems - NIST Public Safety Communications Research

   · Taxonomy evidence: The portfolio explicitly labels LTE and 5G communications as licensed within its research scope. The market category still requires the actual jurisdiction and underlying network permission for allocation. ([nist.gov](https://www.nist.gov/ctl/pscr/research-portfolios/uncrewed-aircraft-systems))

2. UAS Operator Radio Licence Guidance - Ofcom

   · Taxonomy evidence: The UAS operator radio-license framework includes mobile and satellite terminal access under specified permission conditions, supplying a drone-specific individual-license pathway. ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/manage-your-licence/aeronautical/guidance/uas-operator-radio-licence-guidance.pdf?v=xx.xx))

   · Taxonomy evidence: The UAS operator radio license provides a distinct spectrum-permission route for relevant drone equipment.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.

3. Class licences - Australian Communications and Media Authority
   - Taxonomy evidence: The page identifies cellular terminals communicating with licensed base stations and satellite terminals communicating with licensed space stations, supporting distinction between terminal permission and underlying network licensing.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
4. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.

5. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
6. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
7. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
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    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
14. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
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15. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
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16. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
17. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
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    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
18. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
19. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
20. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
21. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

22. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
23. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

24. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
25. Civil Aviation Safety Authority Annual Report 2024-25
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
26. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
27. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
28. Declaração de Conformidade para Uso Próprio - Anatel
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
29. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))

16.3. Mixed Spectrum Authorization

Table 186. Global Drone Data Link System Market Size, by Mixed Spectrum Authorization, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 187. Global Drone Data Link System Market Size, by Mixed Spectrum Authorization, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 188. Global Drone Data Link System Market Size, by Mixed Spectrum Authorization, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. SkyLine UAS Command & Control - C2 for BVLOS

   · Taxonomy evidence: The current commercial page describes drone C2 configurations combining ISM and LTE access and configurations incorporating satellite communications. These are observed combined-access offerings, not authorization records.

2. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
3. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares.
([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
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    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
15. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
16. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
17. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

18. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
19. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
20. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

21. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
22. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
23. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
24. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

25. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
26. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
27. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
28. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.

16.4. Non-Radio Links

Table 189. Global Drone Data Link System Market Size, by Non-Radio Links, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 190. Global Drone Data Link System Market Size, by Non-Radio Links, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 191. Global Drone Data Link System Market Size, by Non-Radio Links, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. VERSITRON Introduces NDAA-Compliant Tethered Drone Fiber Optic Converters for Secure Airborne Communications

   · Taxonomy evidence: The manufacturer announced availability of drone-specific fiber-optic converter equipment carrying video and telemetry. This supports a non-radio commercial format as of the announcement, not 2025 sales or universal regulatory clearance.

2. Radio Regulations: Organization and Main Concepts - ITU Regional Radiocommunication Seminar
   - Taxonomy evidence: The distinction supplies a conceptual basis for a non-radio permission peer; it does not establish blanket exemption of optical or wired drone links from national safety requirements.
3. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
     ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
     ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
4. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares.
     ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares.
     ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

5. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
6. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
7. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
8. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
9. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
10. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
11. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.

12. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
13. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
14. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
15. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
16. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
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    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
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    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

19. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
20. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
21. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))

22. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
23. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
24. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
25. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

26. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
27. Declaração de Conformidade para Uso Próprio - Anatel
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes.
([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes.
([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
28. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator.
([faa.gov](https://www.faa.gov/media/xx.xx))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator.
([faa.gov](https://www.faa.gov/media/xx.xx))
29. Safe-T Drone Power Station - Elistair
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
30. Defence Procurement Agency DOT - Official Post on Fiber-Optic Drone Procurement and 2025 Deliveries
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.

17. Drone Data Link System Market, by Region

[illegible] A communications supplier should therefore identify the customer's applicable aircraft program and approval owner before promising deployment. These examples concern defined civil pathways, not every operation across Asia-Pacific.

North America presents different commitment triggers within neighboring jurisdictions. [illegible] A cross-border service proposal needs separate acceptance conditions; Canadian eligibility cannot substantiate a U.S. deployment commitment.

Latin American entry can depend on the import and commercial-use relationship as well as aircraft permission. Brazil's Anatel conformity-declaration route for own-use imports excludes commercialization and telecommunications-service provision, while ANAC identifies separate telecommunications and airspace obligations. [illegible] Suppliers can organize reusable qualification documentation for applicable EASA programs while maintaining separate UK radio and network commitments. The alternative of a single undifferentiated European service promise is unsuitable when it obscures the authority or network counterparty controlling access.

[illegible]

[illegible] Procurement should verify the operator's relevant permission before accepting a connected-service commitment. The UAE pathway does not establish access elsewhere in the Middle East.

Africa should not be approached on the assumption that public-interest or nonprofit use removes operator qualification. [illegible] South African requirements are a destination example, not a continent-wide authorization standard.

Figure 35. Global Drone Data Link System Market, by Region: Market share evolution, 2025-2032

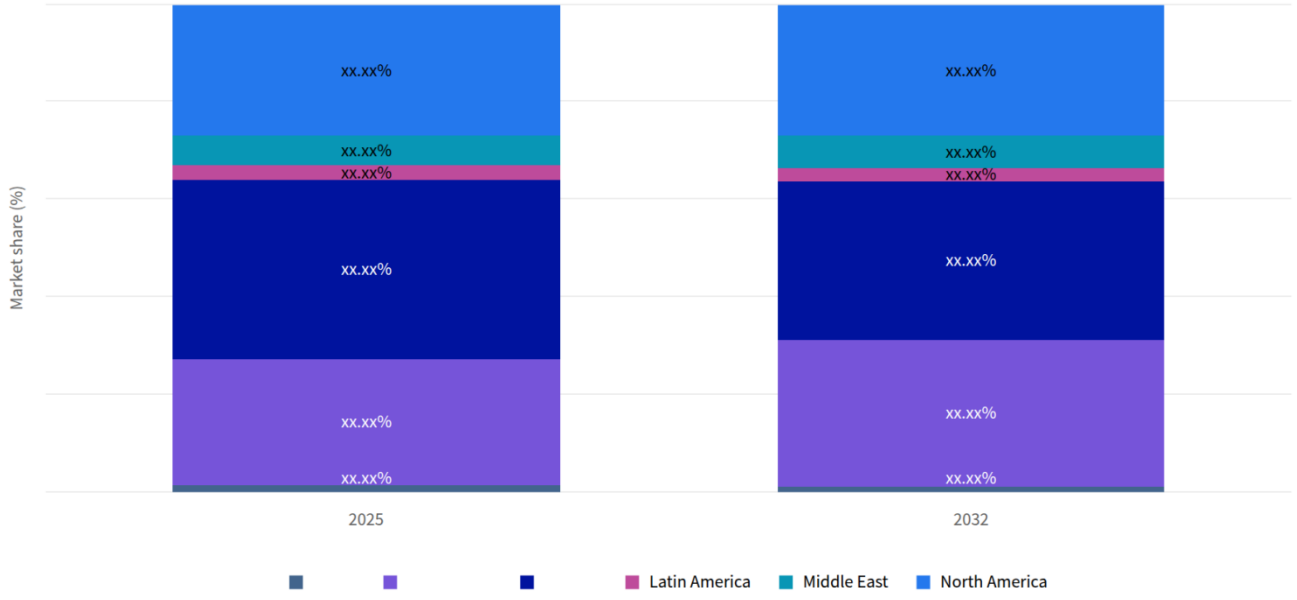

Figure 36. Global Drone Data Link System Market, by Region: Market size by category, 2025

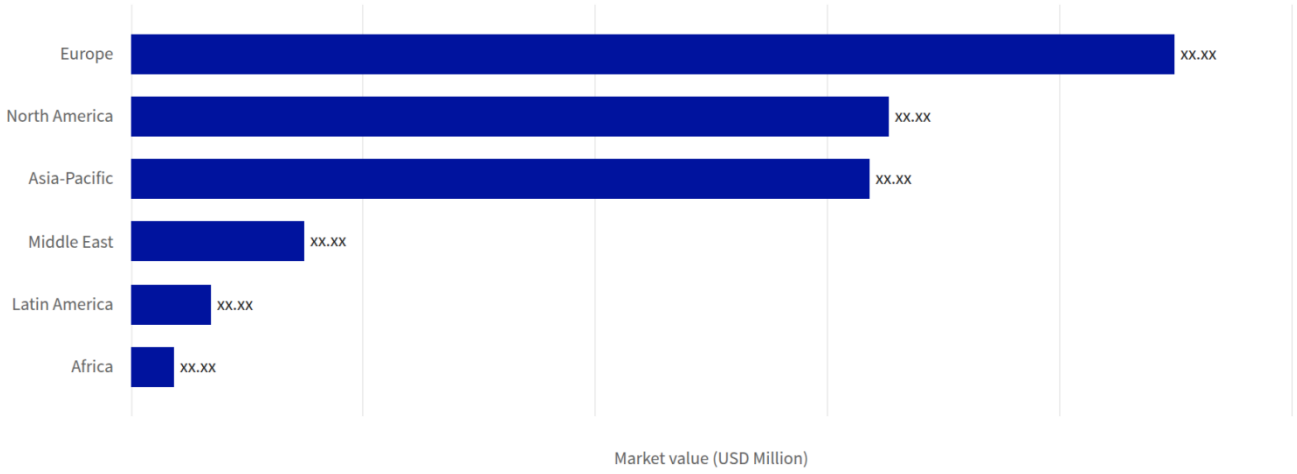

Figure 37. Global Drone Data Link System Market, Regional growth by End User, 2025-2032 (CAGR %)

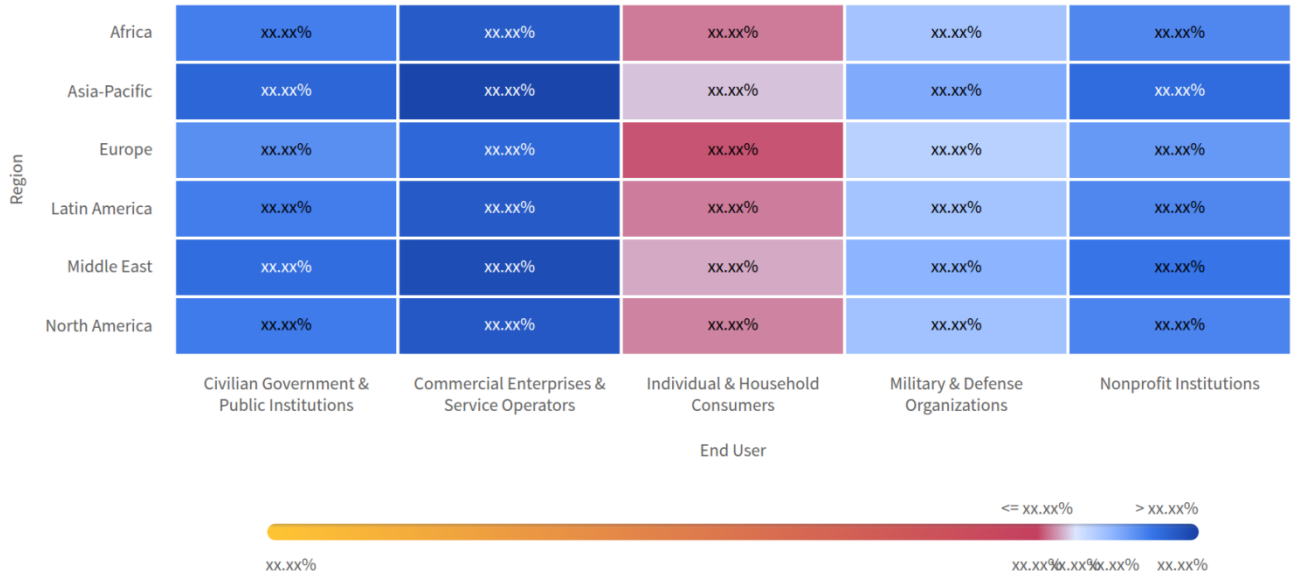

Table 192. Global Drone Data Link System Market, by Region growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 193. Global Drone Data Link System Market Size, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Part 107 Waivers

   · The Part xx.xx waiver route provides a U.S.-specific purchasing gate for applicable BVLOS deployments. ([faa.gov](https://www.faa.gov/uas/commercial_operators/part_107_waivers))

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.

   · Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

2. Operational Authorisation

   · EASA harmonizes the relevant civil framework within its Member States, supporting bounded qualification reuse rather than a Europe-wide radio entitlement. ([easa.europa.eu](https://www.easa.europa.eu/en/domains/drones-air-mobility/operating-drone/specific-category-civil-drones/operational-authorisation))

3. Beyond visual line-of-sight operations

   · Australia's BVLOS pathway separately requires operator certification, pilot qualification and flight approval. ([casa.gov.au](https://www.casa.gov.au/drones/flight-authorisations/beyond-visual-line-sight-operations))

4. Statement: Spectrum for Unmanned Aircraft Systems (UAS)
   · The UK UAS radio framework remains separate from aviation requirements and includes network-consent conditions.
   ([ofcom.org.uk](https://www.ofcom.org.uk/spectrum/radio-equipment/spectrum-for-unmanned-aircraft-systems))
5. 2025 Summary of changes to Canada’s drone regulations
   · Canada's defined lower-risk pathway has its own pilot and operator prerequisites, supporting separate North American commitment conditions. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
6. Unmanned Aircraft "LEVEL 4" Flight Web Portal
   · Japan's Level xx.xx pathway requires Class xx.xx aircraft certification, Class xx.xx pilot certification and flight permission or approval. ([mlit.go.jp](https://www.mlit.go.jp/koku/level4/en/))
7. Operator and activity permits
   · Singapore distinguishes operator and activity permits and requires operator-permit holders to subscribe to its Centralised Flight Management System.
   ([caas.gov.sg](https://www.caas.gov.sg/unmanned-aircraft/operator-and-activity-permits/))
8. Declaração de Conformidade para uso próprio
   · Anatel's own-use import conformity route excludes commercialization and use in telecommunications-service provision, supporting separate diligence for resale.
   ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
9. Operations - ANAC National Civil Aviation Agency - Brazil
   · ANAC identifies separate compliance with DECEA and Anatel requirements for Brazilian drone operations.
   ([anac.gov.br](https://www.anac.gov.br/en/faq/drones/operations/))
10. Workshop on Drone UAS/RPAS Operations, Challenges and Opportunities for the NAM/CAR/SAM Regions - Summary of Discussions
    · The June 2025 workshop documents Colombia's RAC xx.xx framework and digital oversight tools as a constituent example.
    ([icao.int](https://www.icao.int/sites/default/files/NACC/MeetingDocs/2025/DroneUASRPAS/English/xx.xx-Report/DroneUASRPASWorkshop2025-SoD-EN.pdf))
    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
11. UAS Registration
    · GCAA states that institutional operator authorization does not itself authorize flight and identifies further operational and capturing-device security requirements.
    ([gcaa.ae](https://gcaa.ae/en/pages/UASRegistration.aspx))
12. Unmanned Aircraft Systems
    · South Africa's approval matrix requires a UAS Operating Certificate for commercial, corporate and nonprofit operations and distinguishes private use. ([caa.co.za](https://www.caa.co.za/industry-information/uas/))

13. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
14. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
    - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
15. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
16. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.

17. Telemetry Radios - Holybro Store
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
18. Motorola Solutions - March 2, 2026 Conference Transcript
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
19. Codan FY2025 Results - ASX Announcement, August 21, 2025
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
20. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
21. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
22. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
23. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

24. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
· Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
25. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
· Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
26. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
· Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
27. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
· Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
28. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
· Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

29. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
30. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales. ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

17.1. Europe

Table 194. Europe Drone Data Link System Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Austria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Norway	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Switzerland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 195. Europe Drone Data Link System Market Size, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Austria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Norway	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Switzerland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 196. Europe Drone Data Link System Market Size, by Offering, 2017-2032 (USD Million)

Offering	2023	2024	2025	2026	2027	2032	CAGR (%)
Connectivity Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integration & Lifecycle Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Management & Transmission Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 197. Europe Drone Data Link System Market Size, by Data Link Hardware, 2017-2032 (USD Million)

Data Link Hardware	2023	2024	2025	2026	2027	2032	CAGR (%)
Complete Data Link Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Terminals & Modules	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Support Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 198. Europe Drone Data Link System Market Size, by Connectivity Technology, 2017-2032 (USD Million)

Connectivity Technology	2023	2024	2025	2026	2027	2032	CAGR (%)
Cellular Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Free-Space Optical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Multibearer Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Noncellular Radio Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Optical Fiber Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Satellite RF Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wired Electrical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 199. Europe Drone Data Link System Market Size, by Noncellular Radio Communications, 2017-2032 (USD Million)

Noncellular Radio Communications	2023	2024	2025	2026	2027	2032	CAGR (%)
Analog Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Analog & Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 200. Europe Drone Data Link System Market Size, by Network Topology, 2017-2032 (USD Million)

Network Topology	2023	2024	2025	2026	2027	2032	CAGR (%)
Centralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Decentralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Topologies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Point-to-Point Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 201. Europe Drone Data Link System Market Size, by Link Function, 2017-2032 (USD Million)

Link Function	2023	2024	2025	2026	2027	2032	CAGR (%)
Flight-Management Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Flight & Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mission Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 202. Europe Drone Data Link System Market Size, by Mission Application, 2017-2032 (USD Million)

Mission Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Agriculture & Forestry	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combat Operations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Communications Relay	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education, Training & Technology Development	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Inspection & Maintenance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intelligence, Surveillance & Reconnaissance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Media Production & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Sport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific Research & Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Search, Rescue & Emergency Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Surveying & Mapping	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transport & Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 203. Europe Drone Data Link System Market Size, by Transport & Logistics, 2017-2032 (USD Million)

Transport & Logistics	2023	2024	2025	2026	2027	2032	CAGR (%)
Cargo Transport & Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Uncrewed Passenger Transport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 204. Europe Drone Data Link System Market Size, by End User, 2017-2032 (USD Million)

End User	2023	2024	2025	2026	2027	2032	CAGR (%)
Civilian Government & Public Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Enterprises & Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Individual & Household Consumers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Military & Defense Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonprofit Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 205. Europe Drone Data Link System Market Size, by Deployment Model, 2017-2032 (USD Million)

Deployment Model	2023	2024	2025	2026	2027	2032	CAGR (%)
Customer-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Provider-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 206. Europe Drone Data Link System Market Size, by Sales Channel, 2017-2032 (USD Million)

Sales Channel	2023	2024	2025	2026	2027	2032	CAGR (%)
Distribution and Retail Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supplier-Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Value-Added Reseller and Integrator Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 207. Europe Drone Data Link System Market Size, by Operating Envelope, 2017-2032 (USD Million)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Beyond-Visual-Line-of-Sight Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visual-Line-of-Sight-Only Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 208. Europe Drone Data Link System Market Size, by Spectrum Access, 2017-2032 (USD Million)

Spectrum Access	2023	2024	2025	2026	2027	2032	CAGR (%)
Individually Licensed or Assigned Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
License-Exempt or Generally Authorized Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mixed Spectrum Authorization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
2. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
3. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: EASA reported more than two million European registered operators in May 2025, constraining the civilian purchasing pool and the forecast baseline rather than measuring equipment shipments. ([easa.europa.eu](https://www.easa.europa.eu/en/newsroom-and-events/press-releases/easa-launches-drone-economy-dashboard-fourth-release-innovative))

4. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
5. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.

6. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
7. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.

8. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
9. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.

10. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
11. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

12. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Three million 2025 FPV receipts provide a recipient-country anchor for Europe's attritable communications allocation; the model applies only communications-equivalent value, not complete aircraft value. ([mod.gov.ua](https://mod.gov.ua/en/news/xx.xx-billion-from-partners-over-xx.xx-million-strike-drones-more-ukrainian-weapons-key-ministry-of-defence-highlights))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
13. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
14. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
15. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

16. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
17. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
18. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
19. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: European spending and national differences constrain qualified-equipment allocation assumptions.
20. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))

21. Drones as a Service for the Whole of Switzerland - Swisscom, August 8, 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The announced infrastructure and service relationship supports a Swiss paid-service purchasing premise, but does not establish completed nationwide deployment or realized revenue. ([swisscom.ch](https://www.swisscom.ch/en/about/news/2024/xx.xx/xx.xx-drohnennetzwerk-schweiz.html))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced infrastructure and service relationship supports a Swiss paid-service purchasing premise, but does not establish completed nationwide deployment or realized revenue. ([swisscom.ch](https://www.swisscom.ch/en/about/news/2024/xx.xx/xx.xx-drohnennetzwerk-schweiz.html))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.
22. Transformation of the Defence Forces: How Ukraine Changed Its System - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
23. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.

24. Safe-T Drone Power Station - Elistair
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
25. Safe-T 2 - Advanced Tethering System Brochure
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
26. UAV/UGV Products - Advanced Microwave Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
27. Aquila20 FPV Kit - BETAFPV
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.

28. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
29. UAV Data Link and Unmanned Communications - DTC, a Codan Company
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.

30. Summary - ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
31. Mynaric AG - Annual Report 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
32. General Atomics and Kepler Communications Successfully Demonstrate Air-to-Space Optical Communications Capability
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
33. Doodle Labs Announces Launch of Reseller Program
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.

34. Where To Buy - DJI
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
35. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 announcement assigns provisioning, billing and integration responsibilities, supporting a managed value-added channel mechanism without measured penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced delivery relationship concerns a dedicated satellite communications service; it supports a forecast premise, not realized 2032 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March 2026 collaboration names provisioning, billing, monitoring and lifecycle duties, supporting a provider-management commercial premise without disclosing penetration.
36. Statement: Spectrum for Unmanned Aircraft Systems - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An intermediary cannot independently grant network permission, limiting the forecast transfer of customer obligations.
37. DJI O4 Air Unit Series - FAQ
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.

38. Read Our Terms & Conditions - Elsight
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
39. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
40. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.

41. DJI Agriculture Reveals Global Adoption of Agricultural Drones Cuts 51Mt in Carbon Emissions and Saves 410Mts of Water for Farmers Globally
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
42. DJI Agriculture's Annual Report Reveals Drone-Powered Farming Revolution at Brazil's Agrishow 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
43. EHang Reports Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results - SEC Exhibit 99.1
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
44. Zipline to Triple U.S. Manufacturing Facility, Creating More Jobs in AI and Robotics
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
45. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.

46. UAS Operator Radio Licence Guidance - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
47. Class Licences - Australian Communications and Media Authority
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
48. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
49. Defence Procurement Agency DOT - Official Post on Fiber-Optic Drone Procurement and 2025 Deliveries
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.

50. ITU-T Y.4215 - Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
51. IFRC Drones Group
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
52. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.

17.2. North America

Table 209. North America Drone Data Link System Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 210. North America Drone Data Link System Market Size, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 211. North America Drone Data Link System Market Size, by Offering, 2017-2032 (USD Million)

Offering	2023	2024	2025	2026	2027	2032	CAGR (%)
Connectivity Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integration & Lifecycle Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Management & Transmission Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 212. North America Drone Data Link System Market Size, by Data Link Hardware, 2017-2032 (USD Million)

Data Link Hardware	2023	2024	2025	2026	2027	2032	CAGR (%)
Complete Data Link Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Terminals & Modules	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Support Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 213. North America Drone Data Link System Market Size, by Connectivity Technology, 2017-2032 (USD Million)

Connectivity Technology	2023	2024	2025	2026	2027	2032	CAGR (%)
Cellular Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Free-Space Optical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Multibearer Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Noncellular Radio Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Optical Fiber Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Satellite RF Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wired Electrical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 214. North America Drone Data Link System Market Size, by Noncellular Radio Communications, 2017-2032 (USD Million)

Noncellular Radio Communications	2023	2024	2025	2026	2027	2032	CAGR (%)
Analog Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Analog & Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 215. North America Drone Data Link System Market Size, by Network Topology, 2017-2032 (USD Million)

Network Topology	2023	2024	2025	2026	2027	2032	CAGR (%)
Centralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Decentralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Topologies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Point-to-Point Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 216. North America Drone Data Link System Market Size, by Link Function, 2017-2032 (USD Million)

Link Function	2023	2024	2025	2026	2027	2032	CAGR (%)
Flight-Management Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Flight & Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mission Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 217. North America Drone Data Link System Market Size, by Mission Application, 2017-2032 (USD Million)

Mission Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Agriculture & Forestry	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combat Operations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Communications Relay	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education, Training & Technology Development	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Inspection & Maintenance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intelligence, Surveillance & Reconnaissance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Media Production & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Sport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific Research & Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Search, Rescue & Emergency Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Surveying & Mapping	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transport & Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 218. North America Drone Data Link System Market Size, by Transport & Logistics, 2017-2032 (USD Million)

Transport & Logistics	2023	2024	2025	2026	2027	2032	CAGR (%)
Cargo Transport & Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Uncrewed Passenger Transport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 219. North America Drone Data Link System Market Size, by End User, 2017-2032 (USD Million)

End User	2023	2024	2025	2026	2027	2032	CAGR (%)
Civilian Government & Public Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Enterprises & Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Individual & Household Consumers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Military & Defense Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonprofit Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 220. North America Drone Data Link System Market Size, by Deployment Model, 2017-2032 (USD Million)

Deployment Model	2023	2024	2025	2026	2027	2032	CAGR (%)
Customer-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Provider-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 221. North America Drone Data Link System Market Size, by Sales Channel, 2017-2032 (USD Million)

Sales Channel	2023	2024	2025	2026	2027	2032	CAGR (%)
Distribution and Retail Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supplier-Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Value-Added Reseller and Integrator Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 222. North America Drone Data Link System Market Size, by Operating Envelope, 2017-2032 (USD Million)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Beyond-Visual-Line-of-Sight Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visual-Line-of-Sight-Only Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 223. North America Drone Data Link System Market Size, by Spectrum Access, 2017-2032 (USD Million)

Spectrum Access	2023	2024	2025	2026	2027	2032	CAGR (%)
Individually Licensed or Assigned Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
License-Exempt or Generally Authorized Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mixed Spectrum Authorization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
2. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The U.S. fleet supplies the principal civilian anchor within North America; Canadian and Mexican activity and institutional equipment are separately modeled.

3. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
4. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.

5. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.
6. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.

7. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.

8. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
9. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.

10. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
11. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

12. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.

13. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
- Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

14. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

15. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

16. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
17. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
18. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
19. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National defense spending cross-checks institutional equipment scale, not market shares.

20. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
21. Transformation of the Defence Forces: How Ukraine Changed Its System - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
22. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
23. Safe-T Drone Power Station - Elistair
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.

24. Safe-T 2 - Advanced Tethering System Brochure
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
25. UAV/UGV Products - Advanced Microwave Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
26. Aquila20 FPV Kit - BETAFPV
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.

27. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
28. UAV Data Link and Unmanned Communications - DTC, a Codan Company
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.

29. Summary - ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
30. Mynaric AG - Annual Report 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
31. General Atomics and Kepler Communications Successfully Demonstrate Air-to-Space Optical Communications Capability
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
32. Doodle Labs Announces Launch of Reseller Program
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.

33. Where To Buy - DJI
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
34. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 announcement assigns provisioning, billing and integration responsibilities, supporting a managed value-added channel mechanism without measured penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced delivery relationship concerns a dedicated satellite communications service; it supports a forecast premise, not realized 2032 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March 2026 collaboration names provisioning, billing, monitoring and lifecycle duties, supporting a provider-management commercial premise without disclosing penetration.
35. Statement: Spectrum for Unmanned Aircraft Systems - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An intermediary cannot independently grant network permission, limiting the forecast transfer of customer obligations.
36. DJI O4 Air Unit Series - FAQ
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.

37. Read Our Terms & Conditions - Elsight
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
38. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
39. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.

40. DJI Agriculture Reveals Global Adoption of Agricultural Drones Cuts 51Mt in Carbon Emissions and Saves 410Mts of Water for Farmers Globally
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
41. DJI Agriculture's Annual Report Reveals Drone-Powered Farming Revolution at Brazil's Agrishow 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
42. EHang Reports Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results - SEC Exhibit 99.1
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
43. Zipline to Triple U.S. Manufacturing Facility, Creating More Jobs in AI and Robotics
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
44. Swisscom Broadcast and Nokia Build Joint Drone Network Across Switzerland
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.

45. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
46. UAS Operator Radio Licence Guidance - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
47. Class Licences - Australian Communications and Media Authority
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
48. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.

49. Defence Procurement Agency DOT - Official Post on Fiber-Optic Drone Procurement and 2025 Deliveries
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
50. ITU-T Y.4215 - Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
51. IFRC Drones Group
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
52. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.

17.3. Asia-Pacific

Table 224. Asia-Pacific Drone Data Link System Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indonesia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malaysia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Philippines	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Singapore	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Taiwan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Thailand	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 225. Asia-Pacific Drone Data Link System Market Size, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indonesia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malaysia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Philippines	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Singapore	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Taiwan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Thailand	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 226. Asia-Pacific Drone Data Link System Market Size, by Offering, 2017-2032 (USD Million)

Offering	2023	2024	2025	2026	2027	2032	CAGR (%)
Connectivity Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integration & Lifecycle Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Management & Transmission Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 227. Asia-Pacific Drone Data Link System Market Size, by Data Link Hardware, 2017-2032 (USD Million)

Data Link Hardware	2023	2024	2025	2026	2027	2032	CAGR (%)
Complete Data Link Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Terminals & Modules	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Support Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 228. Asia-Pacific Drone Data Link System Market Size, by Connectivity Technology, 2017-2032 (USD Million)

Connectivity Technology	2023	2024	2025	2026	2027	2032	CAGR (%)
Cellular Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Free-Space Optical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Multibearer Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Noncellular Radio Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Optical Fiber Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Satellite RF Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wired Electrical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 229. Asia-Pacific Drone Data Link System Market Size, by Noncellular Radio Communications, 2017-2032 (USD Million)

Noncellular Radio Communications	2023	2024	2025	2026	2027	2032	CAGR (%)
Analog Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Analog & Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 230. Asia-Pacific Drone Data Link System Market Size, by Network Topology, 2017-2032 (USD Million)

Network Topology	2023	2024	2025	2026	2027	2032	CAGR (%)
Centralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Decentralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Topologies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Point-to-Point Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 231. Asia-Pacific Drone Data Link System Market Size, by Link Function, 2017-2032 (USD Million)

Link Function	2023	2024	2025	2026	2027	2032	CAGR (%)
Flight-Management Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Flight & Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mission Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 232. Asia-Pacific Drone Data Link System Market Size, by Mission Application, 2017-2032 (USD Million)

Mission Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Agriculture & Forestry	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combat Operations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Communications Relay	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education, Training & Technology Development	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Inspection & Maintenance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intelligence, Surveillance & Reconnaissance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Media Production & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Sport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific Research & Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Search, Rescue & Emergency Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Surveying & Mapping	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transport & Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 233. Asia-Pacific Drone Data Link System Market Size, by Transport & Logistics, 2017-2032 (USD Million)

Transport & Logistics	2023	2024	2025	2026	2027	2032	CAGR (%)
Cargo Transport & Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Uncrewed Passenger Transport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 234. Asia-Pacific Drone Data Link System Market Size, by End User, 2017-2032 (USD Million)

End User	2023	2024	2025	2026	2027	2032	CAGR (%)
Civilian Government & Public Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Enterprises & Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Individual & Household Consumers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Military & Defense Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonprofit Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 235. Asia-Pacific Drone Data Link System Market Size, by Deployment Model, 2017-2032 (USD Million)

Deployment Model	2023	2024	2025	2026	2027	2032	CAGR (%)
Customer-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Provider-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 236. Asia-Pacific Drone Data Link System Market Size, by Sales Channel, 2017-2032 (USD Million)

Sales Channel	2023	2024	2025	2026	2027	2032	CAGR (%)
Distribution and Retail Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supplier-Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Value-Added Reseller and Integrator Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 237. Asia-Pacific Drone Data Link System Market Size, by Operating Envelope, 2017-2032 (USD Million)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Beyond-Visual-Line-of-Sight Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visual-Line-of-Sight-Only Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 238. Asia-Pacific Drone Data Link System Market Size, by Spectrum Access, 2017-2032 (USD Million)

Spectrum Access	2023	2024	2025	2026	2027	2032	CAGR (%)
Individually Licensed or Assigned Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
License-Exempt or Generally Authorized Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mixed Spectrum Authorization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chinese domestic fleet growth anchors the regional civilian component, with explicit replacement, price and non-Chinese adjustments; it does not establish the final regional percentage.
2. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
3. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.

4. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
5. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.

6. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
7. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.

8. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
9. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.

10. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
11. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

12. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.

13. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
- Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

14. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

15. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

16. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
17. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
18. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
19. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian national spending constrains institutional equipment assumptions; published spending is not copied as drone-link shares. ([sipri.org](https://www.sipri.org/sites/default/files/2026-xx.xx/2604_milex_2025.pdf))
20. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asian recipient differences support country-specific institutional adjustments and caution against using manufacturing or exports as demand.

21. Civil Aviation Safety Authority Annual Report 2024-25
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))

22. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

23. Operator and Activity Permits - Civil Aviation Authority of Singapore
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator/activity permits and the required flight-management-service relationship constrain Singapore's addressable paid-service premise; no ASEAN-wide entitlement or revenue observation is inferred. ([caas.gov.sg](https://www.caas.gov.sg/unmanned-aircraft/operator-and-activity-permits/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator/activity permits and the required flight-management-service relationship constrain Singapore's addressable paid-service premise; no ASEAN-wide entitlement or revenue observation is inferred. ([caas.gov.sg](https://www.caas.gov.sg/unmanned-aircraft/operator-and-activity-permits/))

24. Transformation of the Defence Forces: How Ukraine Changed Its System - Ministry of Defence of Ukraine
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.

25. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
26. Safe-T Drone Power Station - Elistair
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
27. Safe-T 2 - Advanced Tethering System Brochure
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.

28. UAV/UGV Products - Advanced Microwave Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
29. Aquila20 FPV Kit - BETAFPV
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.

30. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
31. UAV Data Link and Unmanned Communications - DTC, a Codan Company
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.

32. Summary - ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
33. Mynaric AG - Annual Report 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
34. General Atomics and Kepler Communications Successfully Demonstrate Air-to-Space Optical Communications Capability
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
35. Doodle Labs Announces Launch of Reseller Program
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.

36. Where To Buy - DJI
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
37. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 announcement assigns provisioning, billing and integration responsibilities, supporting a managed value-added channel mechanism without measured penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced delivery relationship concerns a dedicated satellite communications service; it supports a forecast premise, not realized 2032 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March 2026 collaboration names provisioning, billing, monitoring and lifecycle duties, supporting a provider-management commercial premise without disclosing penetration.
38. Statement: Spectrum for Unmanned Aircraft Systems - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An intermediary cannot independently grant network permission, limiting the forecast transfer of customer obligations.
39. DJI O4 Air Unit Series - FAQ
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.

40. Read Our Terms & Conditions - Elsight
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
41. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
42. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.

43. DJI Agriculture Reveals Global Adoption of Agricultural Drones Cuts 51Mt in Carbon Emissions and Saves 410Mts of Water for Farmers Globally
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
44. DJI Agriculture's Annual Report Reveals Drone-Powered Farming Revolution at Brazil's Agrishow 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
45. EHang Reports Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results - SEC Exhibit 99.1
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
46. Zipline to Triple U.S. Manufacturing Facility, Creating More Jobs in AI and Robotics
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
47. Swisscom Broadcast and Nokia Build Joint Drone Network Across Switzerland
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.

48. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
49. UAS Operator Radio Licence Guidance - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
50. Class Licences - Australian Communications and Media Authority
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
51. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.

52. Defence Procurement Agency DOT - Official Post on Fiber-Optic Drone Procurement and 2025 Deliveries
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
53. ITU-T Y.4215 - Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
54. IFRC Drones Group
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
55. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.

17.4. Middle East

Table 239. Middle East Drone Data Link System Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Israel	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Qatar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Saudi Arabia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Turkey	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Arab Emirates	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 240. Middle East Drone Data Link System Market Size, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Israel	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Qatar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Saudi Arabia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Turkey	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Arab Emirates	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 241. Middle East Drone Data Link System Market Size, by Offering, 2017-2032 (USD Million)

Offering	2023	2024	2025	2026	2027	2032	CAGR (%)
Connectivity Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integration & Lifecycle Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Management & Transmission Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 242. Middle East Drone Data Link System Market Size, by Data Link Hardware, 2017-2032 (USD Million)

Data Link Hardware	2023	2024	2025	2026	2027	2032	CAGR (%)
Complete Data Link Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Terminals & Modules	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Support Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 243. Middle East Drone Data Link System Market Size, by Connectivity Technology, 2017-2032 (USD Million)

Connectivity Technology	2023	2024	2025	2026	2027	2032	CAGR (%)
Cellular Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Free-Space Optical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Multibearer Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Noncellular Radio Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Optical Fiber Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Satellite RF Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wired Electrical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 244. Middle East Drone Data Link System Market Size, by Noncellular Radio Communications, 2017-2032 (USD Million)

Noncellular Radio Communications	2023	2024	2025	2026	2027	2032	CAGR (%)
Analog Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Analog & Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 245. Middle East Drone Data Link System Market Size, by Network Topology, 2017-2032 (USD Million)

Network Topology	2023	2024	2025	2026	2027	2032	CAGR (%)
Centralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Decentralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Topologies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Point-to-Point Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 246. Middle East Drone Data Link System Market Size, by Link Function, 2017-2032 (USD Million)

Link Function	2023	2024	2025	2026	2027	2032	CAGR (%)
Flight-Management Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Flight & Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mission Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 247. Middle East Drone Data Link System Market Size, by Mission Application, 2017-2032 (USD Million)

Mission Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Agriculture & Forestry	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combat Operations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Communications Relay	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education, Training & Technology Development	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Inspection & Maintenance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intelligence, Surveillance & Reconnaissance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Media Production & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Sport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific Research & Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Search, Rescue & Emergency Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Surveying & Mapping	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transport & Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 248. Middle East Drone Data Link System Market Size, by Transport & Logistics, 2017-2032 (USD Million)

Transport & Logistics	2023	2024	2025	2026	2027	2032	CAGR (%)
Cargo Transport & Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Uncrewed Passenger Transport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 249. Middle East Drone Data Link System Market Size, by End User, 2017-2032 (USD Million)

End User	2023	2024	2025	2026	2027	2032	CAGR (%)
Civilian Government & Public Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Enterprises & Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Individual & Household Consumers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Military & Defense Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonprofit Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 250. Middle East Drone Data Link System Market Size, by Deployment Model, 2017-2032 (USD Million)

Deployment Model	2023	2024	2025	2026	2027	2032	CAGR (%)
Customer-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Provider-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 251. Middle East Drone Data Link System Market Size, by Sales Channel, 2017-2032 (USD Million)

Sales Channel	2023	2024	2025	2026	2027	2032	CAGR (%)
Distribution and Retail Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supplier-Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Value-Added Reseller and Integrator Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 252. Middle East Drone Data Link System Market Size, by Operating Envelope, 2017-2032 (USD Million)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Beyond-Visual-Line-of-Sight Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visual-Line-of-Sight-Only Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 253. Middle East Drone Data Link System Market Size, by Spectrum Access, 2017-2032 (USD Million)

Spectrum Access	2023	2024	2025	2026	2027	2032	CAGR (%)
Individually Licensed or Assigned Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
License-Exempt or Generally Authorized Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mixed Spectrum Authorization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
2. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
3. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.

4. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
5. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.

6. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
7. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.

8. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
9. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.

10. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
11. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

12. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.

13. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
- Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

14. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

15. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

16. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
17. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
18. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
19. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National Middle Eastern spending constrains modeled communications-content intensities.
20. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different Gulf recipient profiles constrain qualified-equipment assumptions without treating broad arms imports as drone-link purchases.

21. UAS Registration - General Civil Aviation Authority of UAE
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator authorization is distinct from mission permission, qualifying the modeled UAE enterprise-service adoption premise rather than establishing paid deployment. ([gcaa.ae](https://gcaa.ae/en/pages/UASRegistration.aspx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator authorization is distinct from mission permission, qualifying the modeled UAE enterprise-service adoption premise rather than establishing paid deployment. ([gcaa.ae](https://gcaa.ae/en/pages/UASRegistration.aspx))
22. Transformation of the Defence Forces: How Ukraine Changed Its System - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
23. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
24. Safe-T Drone Power Station - Elistair
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.

25. Safe-T 2 - Advanced Tethering System Brochure
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
26. UAV/UGV Products - Advanced Microwave Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
27. Aquila20 FPV Kit - BETAFPV
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.

28. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
29. UAV Data Link and Unmanned Communications - DTC, a Codan Company
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.

30. Summary - ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
31. Mynaric AG - Annual Report 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
32. General Atomics and Kepler Communications Successfully Demonstrate Air-to-Space Optical Communications Capability
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
33. Doodle Labs Announces Launch of Reseller Program
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.

34. Where To Buy - DJI
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
35. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 announcement assigns provisioning, billing and integration responsibilities, supporting a managed value-added channel mechanism without measured penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced delivery relationship concerns a dedicated satellite communications service; it supports a forecast premise, not realized 2032 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March 2026 collaboration names provisioning, billing, monitoring and lifecycle duties, supporting a provider-management commercial premise without disclosing penetration.
36. Statement: Spectrum for Unmanned Aircraft Systems - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An intermediary cannot independently grant network permission, limiting the forecast transfer of customer obligations.
37. DJI O4 Air Unit Series - FAQ
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.

38. Read Our Terms & Conditions - Elsight
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
39. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
40. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.

41. DJI Agriculture Reveals Global Adoption of Agricultural Drones Cuts 51Mt in Carbon Emissions and Saves 410Mts of Water for Farmers Globally
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
42. DJI Agriculture's Annual Report Reveals Drone-Powered Farming Revolution at Brazil's Agrishow 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
43. EHang Reports Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results - SEC Exhibit 99.1
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
44. Zipline to Triple U.S. Manufacturing Facility, Creating More Jobs in AI and Robotics
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
45. Swisscom Broadcast and Nokia Build Joint Drone Network Across Switzerland
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.

46. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
47. UAS Operator Radio Licence Guidance - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
48. Class Licences - Australian Communications and Media Authority
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
49. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.

50. Defence Procurement Agency DOT - Official Post on Fiber-Optic Drone Procurement and 2025 Deliveries
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
51. ITU-T Y.4215 - Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
52. IFRC Drones Group
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
53. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.

17.5. Latin America

Table 254. Latin America Drone Data Link System Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Argentina	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chile	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Colombia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Peru	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 255. Latin America Drone Data Link System Market Size, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Argentina	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chile	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Colombia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Peru	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 256. Latin America Drone Data Link System Market Size, by Offering, 2017-2032 (USD Million)

Offering	2023	2024	2025	2026	2027	2032	CAGR (%)
Connectivity Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integration & Lifecycle Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Management & Transmission Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 257. Latin America Drone Data Link System Market Size, by Data Link Hardware, 2017-2032 (USD Million)

Data Link Hardware	2023	2024	2025	2026	2027	2032	CAGR (%)
Complete Data Link Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Terminals & Modules	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Support Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 258. Latin America Drone Data Link System Market Size, by Connectivity Technology, 2017-2032 (USD Million)

Connectivity Technology	2023	2024	2025	2026	2027	2032	CAGR (%)
Cellular Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Free-Space Optical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Multibearer Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Noncellular Radio Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Optical Fiber Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Satellite RF Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wired Electrical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 259. Latin America Drone Data Link System Market Size, by Noncellular Radio Communications, 2017-2032 (USD Million)

Noncellular Radio Communications	2023	2024	2025	2026	2027	2032	CAGR (%)
Analog Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Analog & Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 260. Latin America Drone Data Link System Market Size, by Network Topology, 2017-2032 (USD Million)

Network Topology	2023	2024	2025	2026	2027	2032	CAGR (%)
Centralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Decentralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Topologies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Point-to-Point Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 261. Latin America Drone Data Link System Market Size, by Link Function, 2017-2032 (USD Million)

Link Function	2023	2024	2025	2026	2027	2032	CAGR (%)
Flight-Management Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Flight & Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mission Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 262. Latin America Drone Data Link System Market Size, by Mission Application, 2017-2032 (USD Million)

Mission Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Agriculture & Forestry	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combat Operations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Communications Relay	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education, Training & Technology Development	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Inspection & Maintenance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intelligence, Surveillance & Reconnaissance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Media Production & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Sport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific Research & Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Search, Rescue & Emergency Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Surveying & Mapping	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transport & Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 263. Latin America Drone Data Link System Market Size, by Transport & Logistics, 2017-2032 (USD Million)

Transport & Logistics	2023	2024	2025	2026	2027	2032	CAGR (%)
Cargo Transport & Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Uncrewed Passenger Transport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 264. Latin America Drone Data Link System Market Size, by End User, 2017-2032 (USD Million)

End User	2023	2024	2025	2026	2027	2032	CAGR (%)
Civilian Government & Public Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Enterprises & Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Individual & Household Consumers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Military & Defense Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonprofit Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 265. Latin America Drone Data Link System Market Size, by Deployment Model, 2017-2032 (USD Million)

Deployment Model	2023	2024	2025	2026	2027	2032	CAGR (%)
Customer-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Provider-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 266. Latin America Drone Data Link System Market Size, by Sales Channel, 2017-2032 (USD Million)

Sales Channel	2023	2024	2025	2026	2027	2032	CAGR (%)
Distribution and Retail Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supplier-Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Value-Added Reseller and Integrator Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 267. Latin America Drone Data Link System Market Size, by Operating Envelope, 2017-2032 (USD Million)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Beyond-Visual-Line-of-Sight Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visual-Line-of-Sight-Only Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 268. Latin America Drone Data Link System Market Size, by Spectrum Access, 2017-2032 (USD Million)

Spectrum Access	2023	2024	2025	2026	2027	2032	CAGR (%)
Individually Licensed or Assigned Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
License-Exempt or Generally Authorized Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mixed Spectrum Authorization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
2. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
3. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.

4. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
5. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.

6. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
7. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.

8. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
9. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.

10. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
11. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

12. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.

13. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
- Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

14. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

15. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

16. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
17. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
18. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
19. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South American spending constrains institutional purchasing assumptions, not direct link demand.

20. ICAO NAM/CAR/SAM Drone UAS/RPAS Workshop - Summary of Discussions, June 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Over xx.xx Colombian UAS and xx.xx registered pilots provide a June 2025 purchasing-pool constraint, with explicit stock-to-flow and communications-value assumptions. ([icao.int](https://www.icao.int/sites/default/files/NACC/MeetingDocs/2025/DroneUASRPAS/English/xx.xx-Report/DroneUASRPASWorkshop2025-SoD-EN.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Over xx.xx Colombian UAS and xx.xx registered pilots provide a June 2025 purchasing-pool constraint, with explicit stock-to-flow and communications-value assumptions. ([icao.int](https://www.icao.int/sites/default/files/NACC/MeetingDocs/2025/DroneUASRPAS/English/xx.xx-Report/DroneUASRPASWorkshop2025-SoD-EN.pdf))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: National administrative differences qualify a common regional adoption or permission assumption; the source does not publish the regional market allocation.
21. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
22. Transformation of the Defence Forces: How Ukraine Changed Its System - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
23. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.

24. Safe-T Drone Power Station - Elistair
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
25. Safe-T 2 - Advanced Tethering System Brochure
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
26. UAV/UGV Products - Advanced Microwave Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
27. Aquila20 FPV Kit - BETAFPV
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.

28. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
29. UAV Data Link and Unmanned Communications - DTC, a Codan Company
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.

30. Summary - ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
31. Mynaric AG - Annual Report 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
32. General Atomics and Kepler Communications Successfully Demonstrate Air-to-Space Optical Communications Capability
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
33. Doodle Labs Announces Launch of Reseller Program
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.

34. Where To Buy - DJI
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
35. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 announcement assigns provisioning, billing and integration responsibilities, supporting a managed value-added channel mechanism without measured penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced delivery relationship concerns a dedicated satellite communications service; it supports a forecast premise, not realized 2032 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March 2026 collaboration names provisioning, billing, monitoring and lifecycle duties, supporting a provider-management commercial premise without disclosing penetration.
36. Statement: Spectrum for Unmanned Aircraft Systems - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An intermediary cannot independently grant network permission, limiting the forecast transfer of customer obligations.
37. DJI O4 Air Unit Series - FAQ
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.

38. Read Our Terms & Conditions - Elsight
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
39. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
40. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.

41. DJI Agriculture Reveals Global Adoption of Agricultural Drones Cuts 51Mt in Carbon Emissions and Saves 410Mts of Water for Farmers Globally
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
42. DJI Agriculture's Annual Report Reveals Drone-Powered Farming Revolution at Brazil's Agrishow 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
43. EHang Reports Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results - SEC Exhibit 99.1
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
44. Zipline to Triple U.S. Manufacturing Facility, Creating More Jobs in AI and Robotics
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
45. Swisscom Broadcast and Nokia Build Joint Drone Network Across Switzerland
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.

46. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
47. UAS Operator Radio Licence Guidance - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
48. Class Licences - Australian Communications and Media Authority
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
49. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.

50. Defence Procurement Agency DOT - Official Post on Fiber-Optic Drone Procurement and 2025 Deliveries
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
51. ITU-T Y.4215 - Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
52. IFRC Drones Group
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
53. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.

17.6. Africa

Table 269. Africa Drone Data Link System Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Egypt	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Kenya	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nigeria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 270. Africa Drone Data Link System Market Size, by Region, 2017-2032 (USD Million)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Egypt	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Kenya	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nigeria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 271. Africa Drone Data Link System Market Size, by Offering, 2017-2032 (USD Million)

Offering	2023	2024	2025	2026	2027	2032	CAGR (%)
Connectivity Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integration & Lifecycle Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Management & Transmission Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 272. Africa Drone Data Link System Market Size, by Data Link Hardware, 2017-2032 (USD Million)

Data Link Hardware	2023	2024	2025	2026	2027	2032	CAGR (%)
Complete Data Link Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Terminals & Modules	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Support Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 273. Africa Drone Data Link System Market Size, by Connectivity Technology, 2017-2032 (USD Million)

Connectivity Technology	2023	2024	2025	2026	2027	2032	CAGR (%)
Cellular Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Free-Space Optical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Multibearer Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Noncellular Radio Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Optical Fiber Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Satellite RF Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wired Electrical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 274. Africa Drone Data Link System Market Size, by Noncellular Radio Communications, 2017-2032 (USD Million)

Noncellular Radio Communications	2023	2024	2025	2026	2027	2032	CAGR (%)
Analog Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Analog & Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 275. Africa Drone Data Link System Market Size, by Network Topology, 2017-2032 (USD Million)

Network Topology	2023	2024	2025	2026	2027	2032	CAGR (%)
Centralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Decentralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Topologies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Point-to-Point Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 276. Africa Drone Data Link System Market Size, by Link Function, 2017-2032 (USD Million)

Link Function	2023	2024	2025	2026	2027	2032	CAGR (%)
Flight-Management Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Flight & Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mission Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 277. Africa Drone Data Link System Market Size, by Mission Application, 2017-2032 (USD Million)

Mission Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Agriculture & Forestry	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combat Operations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Communications Relay	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education, Training & Technology Development	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Inspection & Maintenance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intelligence, Surveillance & Reconnaissance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Media Production & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Sport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific Research & Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Search, Rescue & Emergency Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Surveying & Mapping	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transport & Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 278. Africa Drone Data Link System Market Size, by Transport & Logistics, 2017-2032 (USD Million)

Transport & Logistics	2023	2024	2025	2026	2027	2032	CAGR (%)
Cargo Transport & Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Uncrewed Passenger Transport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 279. Africa Drone Data Link System Market Size, by End User, 2017-2032 (USD Million)

End User	2023	2024	2025	2026	2027	2032	CAGR (%)
Civilian Government & Public Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Enterprises & Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Individual & Household Consumers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Military & Defense Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonprofit Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 280. Africa Drone Data Link System Market Size, by Deployment Model, 2017-2032 (USD Million)

Deployment Model	2023	2024	2025	2026	2027	2032	CAGR (%)
Customer-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Provider-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 281. Africa Drone Data Link System Market Size, by Sales Channel, 2017-2032 (USD Million)

Sales Channel	2023	2024	2025	2026	2027	2032	CAGR (%)
Distribution and Retail Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supplier-Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Value-Added Reseller and Integrator Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 282. Africa Drone Data Link System Market Size, by Operating Envelope, 2017-2032 (USD Million)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Beyond-Visual-Line-of-Sight Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visual-Line-of-Sight-Only Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 283. Africa Drone Data Link System Market Size, by Spectrum Access, 2017-2032 (USD Million)

Spectrum Access	2023	2024	2025	2026	2027	2032	CAGR (%)
Individually Licensed or Assigned Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
License-Exempt or Generally Authorized Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mixed Spectrum Authorization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
2. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
3. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.

4. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
5. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.

6. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
7. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.

8. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
9. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.

10. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
11. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

12. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.

13. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
- Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

14. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

15. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

16. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
17. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
18. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
19. Trends in World Military Expenditure, 2025 - SIPRI Fact Sheet, April 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: African institutional scale remains distinct from the limited country inventory.
20. Trends in International Arms Transfers, 2025 - SIPRI, March 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales.
      ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recipient patterns support retaining major African demand outside the four assigned countries; transfer indicators are not dollar sales.
      ([sipri.org](https://www.sipri.org/publications/2026/sipri-fact-sheets/trends-international-arms-transfers-2025))

21. Unmanned Aircraft Systems - South African Civil Aviation Authority
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial, corporate and nonprofit operator-approval distinctions constrain addressable professional demand; nonprofit mission interest is not counted as automatically deployable purchasing. ([caa.co.za](https://www.caa.co.za/industry-information/uas/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial, corporate and nonprofit operator-approval distinctions constrain addressable professional demand; nonprofit mission interest is not counted as automatically deployable purchasing. ([caa.co.za](https://www.caa.co.za/industry-information/uas/))
22. UAS Manual of Implementing Standards - Kenya Civil Aviation Authority
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Component import permits and eligible ownership categories constrain the Kenyan purchasing route, not the size of realized demand. ([kcaa.or.ke](https://www.kcaa.or.ke/sites/default/files/docs/uas/Manual%20of%20Implementing%20Standards%xx.xx%28MIS%xx.xx.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Component import permits and eligible ownership categories constrain the Kenyan purchasing route, not the size of realized demand. ([kcaa.or.ke](https://www.kcaa.or.ke/sites/default/files/docs/uas/Manual%20of%20Implementing%20Standards%xx.xx%28MIS%xx.xx.pdf))
23. Transformation of the Defence Forces: How Ukraine Changed Its System - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
24. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.

25. Safe-T Drone Power Station - Elistair
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
26. Safe-T 2 - Advanced Tethering System Brochure
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
27. UAV/UGV Products - Advanced Microwave Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
28. Aquila20 FPV Kit - BETAFPV
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.

29. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
30. UAV Data Link and Unmanned Communications - DTC, a Codan Company
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.

31. Summary - ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
32. Mynaric AG - Annual Report 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
33. General Atomics and Kepler Communications Successfully Demonstrate Air-to-Space Optical Communications Capability
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
34. Doodle Labs Announces Launch of Reseller Program
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.

35. Where To Buy - DJI
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
36. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 announcement assigns provisioning, billing and integration responsibilities, supporting a managed value-added channel mechanism without measured penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced delivery relationship concerns a dedicated satellite communications service; it supports a forecast premise, not realized 2032 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March 2026 collaboration names provisioning, billing, monitoring and lifecycle duties, supporting a provider-management commercial premise without disclosing penetration.
37. Statement: Spectrum for Unmanned Aircraft Systems - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An intermediary cannot independently grant network permission, limiting the forecast transfer of customer obligations.
38. DJI O4 Air Unit Series - FAQ
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.

39. Read Our Terms & Conditions - Elsight
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
40. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
41. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.

42. DJI Agriculture Reveals Global Adoption of Agricultural Drones Cuts 51Mt in Carbon Emissions and Saves 410Mts of Water for Farmers Globally
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
43. DJI Agriculture's Annual Report Reveals Drone-Powered Farming Revolution at Brazil's Agrishow 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
44. EHang Reports Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results - SEC Exhibit 99.1
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
45. Zipline to Triple U.S. Manufacturing Facility, Creating More Jobs in AI and Robotics
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
46. Swisscom Broadcast and Nokia Build Joint Drone Network Across Switzerland
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.

47. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
48. UAS Operator Radio Licence Guidance - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
49. Class Licences - Australian Communications and Media Authority
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
50. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.

51. Defence Procurement Agency DOT - Official Post on Fiber-Optic Drone Procurement and 2025 Deliveries
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
52. ITU-T Y.4215 - Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
53. IFRC Drones Group
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
54. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.

18. Drone Data Link System Market, by Group

The geographic groups are overlapping commercial lenses, not additive markets or interchangeable permission areas. Their usefulness depends on the particular shared institution, procurement route or coordination mechanism. ■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■ ■ ■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■ ■■ ■■■ ■■■■ ■■■■ ■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■ ■■■■■■■■■■■■

Americas: ICAO's June 2025 NAM/CAR/SAM workshop documented regulatory-harmonization and traffic-management infrastructure challenges and described its model regulations as nonbinding. ■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■ ■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■ ■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ Buyers considering a common delivery partner should require destination-specific approval ownership and support commitments; coordination reduces administrative fragmentation only where those duties are actually contracted.

Europe, Middle East & Africa: the practical grouping is a portfolio of distinct approval relationships. EASA's shared civil framework, the UK's separate radio framework, UAE professional-operation approvals and South Africa's operator-certification requirements govern different constituencies. ■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■ ■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■

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GCC: the customs-union framework provides a shared goods-movement mechanism, including a single entry-point concept, while preserving treatment of prohibited and restricted goods. This can support evaluation of a regional distribution hub for eligible link equipment, but not automatic destination approval. ■■■ ■■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■

RESEARCH SAMPLE REPORT

[illegible]

Australasia: Australia and New Zealand both provide operator-approval routes for operations outside their ordinary permitted conditions, but through different national systems. [illegible] Neither aircraft procurement nor a training qualification substitutes for the required operator permission.

Nordic: the Nordic Drone Initiative provides an institutional cooperation context for drone transport, ecosystem development and proposed regulatory changes, not evidence of a common purchasing award. [illegible] A transport ecosystem may help identify prospective counterparties, but investment should wait for a defined customer, offering and permission rather than rely on the initiative's objectives alone.

[illegible] Standard scenarios and appropriate LUC privileges can simplify particular cases, but do not justify ignoring local conditions. Equipment conformity and service-contract coverage remain separate purchasing questions.

BRICS: the 2025 Data Economy Governance Understanding establishes a cooperation agenda while expressly retaining national legal frameworks, data sovereignty and legitimate localization objectives. [illegible] Implemented national measures, rather than the cooperation document alone, should trigger changes in commitments.

G7: the 2025 Industry, Digital and Technology Ministerial Declaration connects supply-chain transparency, semiconductor resilience and security of internet-connected products. This provides a policy rationale for offering-specific provenance and continuing-support diligence,

not a G7 equipment-approval passport. ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪

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Figure 38. Global Drone Data Link System Market Size, by Group, 2025 vs 2026 vs 2032

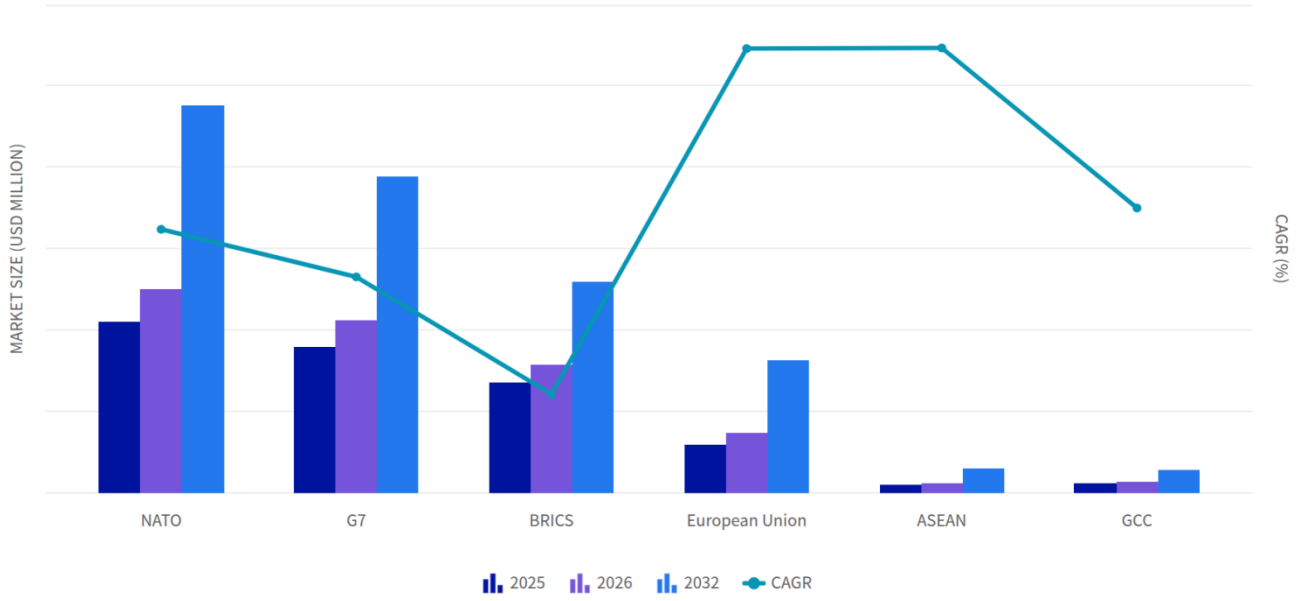

Table 284. Global Drone Data Link System Market Size, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Sources & Evidence

1. Operational Authorisation

   · EASA's framework includes Norway and Iceland; authorizations retain stated limitations and cross-border conditions, with specific exceptions for standard scenarios and appropriate LUC privileges. ([easa.europa.eu](https://www.easa.europa.eu/en/domains/drones-air-mobility/operating-drone/specific-category-civil-drones/operational-authorisation))

2. Beyond visual line-of-sight operations

   · The Australian requirements provide a national approval schedule distinct from New Zealand's Part xx.xx route. ([casa.gov.au](https://www.casa.gov.au/drones/flight-authorisations/beyond-visual-line-sight-operations))

3. Statement: Spectrum for Unmanned Aircraft Systems (UAS)

   · The UK framework establishes a constituent-specific communications relationship rather than a common EMEA permission. ([ofcom.org.uk](https://www.ofcom.org.uk/spectrum/radio-equipment/spectrum-for-unmanned-aircraft-systems))

4. 2025 Summary of changes to Canada’s drone regulations

   · The Canadian pathway is a national constituent example within Americas and G7, not a group-wide authorization. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.

5. Unmanned Aircraft "LEVEL 4" Flight Web Portal

   · Japan supplies a distinct national aircraft-and-pilot qualification example within G7. ([mlit.go.jp](https://www.mlit.go.jp/koku/level4/en/))

6. Operator and activity permits

   · The Singapore requirements establish local purchasing dependencies, not cross-member ASEAN recognition. ([caas.gov.sg](https://www.caas.gov.sg/unmanned-aircraft/operator-and-activity-permits/))

7. Workshop on Drone UAS/RPAS Operations, Challenges and Opportunities for the NAM/CAR/SAM Regions - Summary of Discussions

   · The workshop identifies regulatory-harmonization and traffic-management infrastructure challenges and states that ICAO model regulations are nonbinding. ([icao.int](https://www.icao.int/sites/default/files/NACC/MeetingDocs/2025/DroneUASRPAS/English/xx.xx-Report/DroneUASRPASWorkshop2025-SoD-EN.pdf))

8. UAS Registration

   · UAE professional-operation requirements establish mission-access conditions separate from GCC goods movement or EMEA commercial administration. ([gcaa.ae](https://gcaa.ae/en/pages/UASRegistration.aspx))

9. Unmanned Aircraft Systems

   · The South African operator-certification requirement supplies an African constituent boundary within EMEA contracting analysis. ([caa.co.za](https://www.caa.co.za/industry-information/uas/))

10. □□□□□□□ □□□□ □□□□ □□□□□□□ □□□□□□ □□□□□ □□□□□□ □□□□□□□

    · The GCC customs-union framework describes a single entry-point mechanism and preserves prohibited- and restricted-goods treatment, supporting conditional hub evaluation. ([gcc-sg.org](https://www.gcc-sg.org/ar/JointGulf/Cooperation/GCCCustomsUnion/Pages/default.aspx))

11. Intro to Part 102 certification for unmanned aircraft

    · New Zealand requires a Part xx.xx operator certificate for operations outside Part xx.xx; a training qualification is not itself that certificate. ([aviation.govt.nz](https://www.aviation.govt.nz/drones/regulations/part-xx.xx-certification-for-drones/))

12. Nordic Drone Initiative

    · The Nordic Drone Initiative identifies transport, ecosystem cooperation and proposed regulatory-development objectives, not a common purchasing award. ([norden.org](https://www.norden.org/en/publication/nordic-drone-initiative))

13. Operations in the specific category in a state different from the one of registration

    · The relevant specific-category cross-border route retains destination-authority confirmation and local conditions after home-state authorization. ([easa.europa.eu](https://www.easa.europa.eu/en/domains/civil-drones-rpas/specific-category-civil-drones/operations-specific-category-state-different-one-registration))

14. BRICS Brasil 2025 - BRICS Data Economy Governance Understanding

    · The BRICS Data Economy Governance Understanding retains national frameworks, data sovereignty and legitimate localization objectives while pursuing trusted transfers and cooperation. ([gov.br](https://www.gov.br/mdic/pt-br/centrais-de-conteudo/publicacoes/brics/comercio/ingles/brics_tmm_package_of_outcomes_v21-xx.xx-25_final-version.pdf))

15. G7 2025 Industry, Digital and Technology Ministerial Declaration

    · The G7 declaration addresses supply-chain transparency, semiconductor resilience and security of internet-connected products; these are policy commitments rather than equipment authorization. ([ised-isde.canada.ca](https://ised-isde.canada.ca/site/ised/en/g7-2025-industry-digital-and-technology-ministerial-declaration))

16. Red Cat's Teal Drones Black Widow System Approved for NATO NSPA Catalogue

    · Red Cat reported Black Widow's NSPA catalogue addition on September xx.xx 2025 and identified an integrated Doodle Labs radio; end-user procurement determines configurations and delivery conditions. ([ir.redcatholdings.com](https://ir.redcatholdings.com/news-events/press-releases/detail/xx.xx/red-cats-teal-drones-black-widow-system-approved-for-nato-nspa-catalogue))

17. Regional Coordination

    · ICAO describes regional initiatives toward harmonized approvals, including Asia-Pacific coordination; the publication does not establish an ASEAN operating entitlement. ([icao.int](https://www.icao.int/UA/Regional-Coordination))

18. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China

    · Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.

19. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility

    · Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.

    · Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.

    · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.

20. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub

    · Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.

21. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
22. Telemetry Radios - Holybro Store
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
23. Motorola Solutions - March 2, 2026 Conference Transcript
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
24. Codan FY2025 Results - ASX Announcement, August 21, 2025
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
25. Codan H1 FY2026 Investor Presentation - February 19, 2026
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
26. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
27. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
28. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
29. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.

30. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
31. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
32. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
33. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
34. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

18.1. NATO

Table 285. NATO Drone Data Link System Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Albania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bulgaria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Croatia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Czech Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 285 - continued

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Estonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Greece	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hungary	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iceland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latvia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lithuania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Luxembourg	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Montenegro	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North Macedonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Norway	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Romania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovakia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovenia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Turkey	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 286. NATO Drone Data Link System Market Size, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
Albania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bulgaria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Croatia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Czech Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Estonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Greece	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hungary	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iceland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latvia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lithuania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Luxembourg	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Montenegro	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North Macedonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Norway	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Romania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovakia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovenia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Turkey	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 287. NATO Drone Data Link System Market Size, by Offering, 2017-2032 (USD Million)

Offering	2023	2024	2025	2026	2027	2032	CAGR (%)
Connectivity Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integration & Lifecycle Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Management & Transmission Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 288. NATO Drone Data Link System Market Size, by Data Link Hardware, 2017-2032 (USD Million)

Data Link Hardware	2023	2024	2025	2026	2027	2032	CAGR (%)
Complete Data Link Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Terminals & Modules	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Support Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 289. NATO Drone Data Link System Market Size, by Connectivity Technology, 2017-2032 (USD Million)

Connectivity Technology	2023	2024	2025	2026	2027	2032	CAGR (%)
Cellular Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Free-Space Optical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Multibearer Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Noncellular Radio Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Optical Fiber Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Satellite RF Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wired Electrical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 290. NATO Drone Data Link System Market Size, by Noncellular Radio Communications, 2017-2032 (USD Million)

Noncellular Radio Communications	2023	2024	2025	2026	2027	2032	CAGR (%)
Analog Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Analog & Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 291. NATO Drone Data Link System Market Size, by Network Topology, 2017-2032 (USD Million)

Network Topology	2023	2024	2025	2026	2027	2032	CAGR (%)
Centralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Decentralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Topologies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Point-to-Point Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 292. NATO Drone Data Link System Market Size, by Link Function, 2017-2032 (USD Million)

Link Function	2023	2024	2025	2026	2027	2032	CAGR (%)
Flight-Management Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Flight & Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mission Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 293. NATO Drone Data Link System Market Size, by Mission Application, 2017-2032 (USD Million)

Mission Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Agriculture & Forestry	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combat Operations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Communications Relay	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education, Training & Technology Development	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Inspection & Maintenance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intelligence, Surveillance & Reconnaissance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Media Production & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Sport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific Research & Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Search, Rescue & Emergency Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Surveying & Mapping	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transport & Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 294. NATO Drone Data Link System Market Size, by Transport & Logistics, 2017-2032 (USD Million)

Transport & Logistics	2023	2024	2025	2026	2027	2032	CAGR (%)
Cargo Transport & Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Uncrewed Passenger Transport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 295. NATO Drone Data Link System Market Size, by End User, 2017-2032 (USD Million)

End User	2023	2024	2025	2026	2027	2032	CAGR (%)
Civilian Government & Public Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Enterprises & Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Individual & Household Consumers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Military & Defense Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonprofit Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 296. NATO Drone Data Link System Market Size, by Deployment Model, 2017-2032 (USD Million)

Deployment Model	2023	2024	2025	2026	2027	2032	CAGR (%)
Customer-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Provider-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 297. NATO Drone Data Link System Market Size, by Sales Channel, 2017-2032 (USD Million)

Sales Channel	2023	2024	2025	2026	2027	2032	CAGR (%)
Distribution and Retail Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supplier-Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Value-Added Reseller and Integrator Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 298. NATO Drone Data Link System Market Size, by Operating Envelope, 2017-2032 (USD Million)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Beyond-Visual-Line-of-Sight Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visual-Line-of-Sight-Only Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 299. NATO Drone Data Link System Market Size, by Spectrum Access, 2017-2032 (USD Million)

Spectrum Access	2023	2024	2025	2026	2027	2032	CAGR (%)
Individually Licensed or Assigned Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
License-Exempt or Generally Authorized Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mixed Spectrum Authorization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
2. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
3. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.

4. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
5. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.

6. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
7. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.

8. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
9. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.

10. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
11. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

12. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.

13. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
- Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

14. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

15. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

16. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
17. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
18. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
19. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))

20. Latvian Civil Aviation Agency - Growth in Drone Users and Administrative Offences, April 27, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx year-end 2025 operator observation calibrates modeled annual installations and led to a higher working civilian numerator; forecast turnover and services remain assumptions. ([caa.gov.lv](https://www.caa.gov.lv/en/article/rapid-growth-number-uav-or-drone-users-number-administrative-offences-committed-also-increased-significantly-last-year))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx year-end 2025 operator observation calibrates modeled annual installations and led to a higher working civilian numerator; forecast turnover and services remain assumptions. ([caa.gov.lv](https://www.caa.gov.lv/en/article/rapid-growth-number-uav-or-drone-users-number-administrative-offences-committed-also-increased-significantly-last-year))
21. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
22. Transformation of the Defence Forces: How Ukraine Changed Its System - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
23. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.

24. Safe-T Drone Power Station - Elistair
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
25. Safe-T 2 - Advanced Tethering System Brochure
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
26. UAV/UGV Products - Advanced Microwave Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
27. Aquila20 FPV Kit - BETAFPV
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.

28. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
29. UAV Data Link and Unmanned Communications - DTC, a Codan Company
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.

30. Summary - ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
31. Mynaric AG - Annual Report 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
32. General Atomics and Kepler Communications Successfully Demonstrate Air-to-Space Optical Communications Capability
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
33. Doodle Labs Announces Launch of Reseller Program
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.

34. Where To Buy - DJI
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
35. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 announcement assigns provisioning, billing and integration responsibilities, supporting a managed value-added channel mechanism without measured penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced delivery relationship concerns a dedicated satellite communications service; it supports a forecast premise, not realized 2032 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March 2026 collaboration names provisioning, billing, monitoring and lifecycle duties, supporting a provider-management commercial premise without disclosing penetration.
36. Statement: Spectrum for Unmanned Aircraft Systems - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An intermediary cannot independently grant network permission, limiting the forecast transfer of customer obligations.
37. DJI O4 Air Unit Series - FAQ
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.

38. Read Our Terms & Conditions - Elsight
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
39. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
40. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.

41. DJI Agriculture Reveals Global Adoption of Agricultural Drones Cuts 51Mt in Carbon Emissions and Saves 410Mts of Water for Farmers Globally
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
42. DJI Agriculture's Annual Report Reveals Drone-Powered Farming Revolution at Brazil's Agrishow 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
43. EHang Reports Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results - SEC Exhibit 99.1
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
44. Zipline to Triple U.S. Manufacturing Facility, Creating More Jobs in AI and Robotics
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
45. Swisscom Broadcast and Nokia Build Joint Drone Network Across Switzerland
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.

46. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
47. UAS Operator Radio Licence Guidance - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
48. Class Licences - Australian Communications and Media Authority
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
49. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.

50. Defence Procurement Agency DOT - Official Post on Fiber-Optic Drone Procurement and 2025 Deliveries
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
51. ITU-T Y.4215 - Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
52. IFRC Drones Group
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
53. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.

18.2. G7

Table 300. G7 Drone Data Link System Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 301. G7 Drone Data Link System Market Size, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 302. G7 Drone Data Link System Market Size, by Offering, 2017-2032 (USD Million)

Offering	2023	2024	2025	2026	2027	2032	CAGR (%)
Connectivity Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integration & Lifecycle Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Management & Transmission Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 303. G7 Drone Data Link System Market Size, by Data Link Hardware, 2017-2032 (USD Million)

Data Link Hardware	2023	2024	2025	2026	2027	2032	CAGR (%)
Complete Data Link Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Terminals & Modules	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Support Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 304. G7 Drone Data Link System Market Size, by Connectivity Technology, 2017-2032 (USD Million)

Connectivity Technology	2023	2024	2025	2026	2027	2032	CAGR (%)
Cellular Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Free-Space Optical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Multibearer Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Noncellular Radio Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Optical Fiber Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Satellite RF Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wired Electrical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 305. G7 Drone Data Link System Market Size, by Noncellular Radio Communications, 2017-2032 (USD Million)

Noncellular Radio Communications	2023	2024	2025	2026	2027	2032	CAGR (%)
Analog Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Analog & Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 306. G7 Drone Data Link System Market Size, by Network Topology, 2017-2032 (USD Million)

Network Topology	2023	2024	2025	2026	2027	2032	CAGR (%)
Centralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Decentralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Topologies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Point-to-Point Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 307. G7 Drone Data Link System Market Size, by Link Function, 2017-2032 (USD Million)

Link Function	2023	2024	2025	2026	2027	2032	CAGR (%)
Flight-Management Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Flight & Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mission Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 308. G7 Drone Data Link System Market Size, by Mission Application, 2017-2032 (USD Million)

Mission Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Agriculture & Forestry	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combat Operations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Communications Relay	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education, Training & Technology Development	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Inspection & Maintenance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intelligence, Surveillance & Reconnaissance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Media Production & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Sport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific Research & Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Search, Rescue & Emergency Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Surveying & Mapping	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transport & Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 309. G7 Drone Data Link System Market Size, by Transport & Logistics, 2017-2032 (USD Million)

Transport & Logistics	2023	2024	2025	2026	2027	2032	CAGR (%)
Cargo Transport & Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Uncrewed Passenger Transport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 310. G7 Drone Data Link System Market Size, by End User, 2017-2032 (USD Million)

End User	2023	2024	2025	2026	2027	2032	CAGR (%)
Civilian Government & Public Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Enterprises & Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Individual & Household Consumers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Military & Defense Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonprofit Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 311. G7 Drone Data Link System Market Size, by Deployment Model, 2017-2032 (USD Million)

Deployment Model	2023	2024	2025	2026	2027	2032	CAGR (%)
Customer-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Provider-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 312. G7 Drone Data Link System Market Size, by Sales Channel, 2017-2032 (USD Million)

Sales Channel	2023	2024	2025	2026	2027	2032	CAGR (%)
Distribution and Retail Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supplier-Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Value-Added Reseller and Integrator Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 313. G7 Drone Data Link System Market Size, by Operating Envelope, 2017-2032 (USD Million)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Beyond-Visual-Line-of-Sight Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visual-Line-of-Sight-Only Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 314. G7 Drone Data Link System Market Size, by Spectrum Access, 2017-2032 (USD Million)

Spectrum Access	2023	2024	2025	2026	2027	2032	CAGR (%)
Individually Licensed or Assigned Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
License-Exempt or Generally Authorized Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mixed Spectrum Authorization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
2. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
3. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.

4. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
5. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.

6. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
7. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.

8. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
9. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.

10. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
11. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

12. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.

13. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
- Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

14. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

15. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

16. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
17. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
18. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
19. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))

20. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
21. Transformation of the Defence Forces: How Ukraine Changed Its System - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
22. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
23. Safe-T Drone Power Station - Elistair
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.

24. Safe-T 2 - Advanced Tethering System Brochure
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
25. UAV/UGV Products - Advanced Microwave Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
26. Aquila20 FPV Kit - BETAFPV
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.

27. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
28. UAV Data Link and Unmanned Communications - DTC, a Codan Company
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.

29. Summary - ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
30. Mynaric AG - Annual Report 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
31. General Atomics and Kepler Communications Successfully Demonstrate Air-to-Space Optical Communications Capability
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
32. Doodle Labs Announces Launch of Reseller Program
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.

33. Where To Buy - DJI
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
34. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 announcement assigns provisioning, billing and integration responsibilities, supporting a managed value-added channel mechanism without measured penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced delivery relationship concerns a dedicated satellite communications service; it supports a forecast premise, not realized 2032 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March 2026 collaboration names provisioning, billing, monitoring and lifecycle duties, supporting a provider-management commercial premise without disclosing penetration.
35. Statement: Spectrum for Unmanned Aircraft Systems - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An intermediary cannot independently grant network permission, limiting the forecast transfer of customer obligations.
36. DJI O4 Air Unit Series - FAQ
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.

37. Read Our Terms & Conditions - Elsight
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
38. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
39. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.

40. DJI Agriculture Reveals Global Adoption of Agricultural Drones Cuts 51Mt in Carbon Emissions and Saves 410Mts of Water for Farmers Globally
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
41. DJI Agriculture's Annual Report Reveals Drone-Powered Farming Revolution at Brazil's Agrishow 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
42. EHang Reports Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results - SEC Exhibit 99.1
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
43. Zipline to Triple U.S. Manufacturing Facility, Creating More Jobs in AI and Robotics
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
44. Swisscom Broadcast and Nokia Build Joint Drone Network Across Switzerland
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.

45. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
46. UAS Operator Radio Licence Guidance - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
47. Class Licences - Australian Communications and Media Authority
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
48. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.

49. Defence Procurement Agency DOT - Official Post on Fiber-Optic Drone Procurement and 2025 Deliveries
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
50. ITU-T Y.4215 - Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
51. IFRC Drones Group
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
52. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.

18.3. BRICS

Table 315. BRICS Drone Data Link System Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 316. BRICS Drone Data Link System Market Size, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 317. BRICS Drone Data Link System Market Size, by Offering, 2017-2032 (USD Million)

Offering	2023	2024	2025	2026	2027	2032	CAGR (%)
Connectivity Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integration & Lifecycle Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Management & Transmission Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 318. BRICS Drone Data Link System Market Size, by Data Link Hardware, 2017-2032 (USD Million)

Data Link Hardware	2023	2024	2025	2026	2027	2032	CAGR (%)
Complete Data Link Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Terminals & Modules	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Support Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 319. BRICS Drone Data Link System Market Size, by Connectivity Technology, 2017-2032 (USD Million)

Connectivity Technology	2023	2024	2025	2026	2027	2032	CAGR (%)
Cellular Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Free-Space Optical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Multibearer Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Noncellular Radio Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Optical Fiber Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Satellite RF Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wired Electrical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 320. BRICS Drone Data Link System Market Size, by Noncellular Radio Communications, 2017-2032 (USD Million)

Noncellular Radio Communications	2023	2024	2025	2026	2027	2032	CAGR (%)
Analog Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Analog & Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 321. BRICS Drone Data Link System Market Size, by Network Topology, 2017-2032 (USD Million)

Network Topology	2023	2024	2025	2026	2027	2032	CAGR (%)
Centralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Decentralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Topologies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Point-to-Point Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 322. BRICS Drone Data Link System Market Size, by Link Function, 2017-2032 (USD Million)

Link Function	2023	2024	2025	2026	2027	2032	CAGR (%)
Flight-Management Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Flight & Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mission Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 323. BRICS Drone Data Link System Market Size, by Mission Application, 2017-2032 (USD Million)

Mission Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Agriculture & Forestry	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combat Operations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Communications Relay	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education, Training & Technology Development	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Inspection & Maintenance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intelligence, Surveillance & Reconnaissance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Media Production & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Sport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific Research & Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Search, Rescue & Emergency Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Surveying & Mapping	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transport & Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 324. BRICS Drone Data Link System Market Size, by Transport & Logistics, 2017-2032 (USD Million)

Transport & Logistics	2023	2024	2025	2026	2027	2032	CAGR (%)
Cargo Transport & Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Uncrewed Passenger Transport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 325. BRICS Drone Data Link System Market Size, by End User, 2017-2032 (USD Million)

End User	2023	2024	2025	2026	2027	2032	CAGR (%)
Civilian Government & Public Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Enterprises & Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Individual & Household Consumers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Military & Defense Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonprofit Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 326. BRICS Drone Data Link System Market Size, by Deployment Model, 2017-2032 (USD Million)

Deployment Model	2023	2024	2025	2026	2027	2032	CAGR (%)
Customer-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Provider-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 327. BRICS Drone Data Link System Market Size, by Sales Channel, 2017-2032 (USD Million)

Sales Channel	2023	2024	2025	2026	2027	2032	CAGR (%)
Distribution and Retail Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supplier-Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Value-Added Reseller and Integrator Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 328. BRICS Drone Data Link System Market Size, by Operating Envelope, 2017-2032 (USD Million)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Beyond-Visual-Line-of-Sight Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visual-Line-of-Sight-Only Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 329. BRICS Drone Data Link System Market Size, by Spectrum Access, 2017-2032 (USD Million)

Spectrum Access	2023	2024	2025	2026	2027	2032	CAGR (%)
Individually Licensed or Assigned Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
License-Exempt or Generally Authorized Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mixed Spectrum Authorization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales. ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))
2. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
3. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.

4. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
5. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.

6. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
7. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.

8. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
9. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.

10. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
11. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

12. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.

13. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
- Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

14. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

15. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

16. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
17. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
18. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
19. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

20. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
21. Unmanned Aircraft Systems - South African Civil Aviation Authority
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial, corporate and nonprofit operator-approval distinctions constrain addressable professional demand; nonprofit mission interest is not counted as automatically deployable purchasing. ([caa.co.za](https://www.caa.co.za/industry-information/uas/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial, corporate and nonprofit operator-approval distinctions constrain addressable professional demand; nonprofit mission interest is not counted as automatically deployable purchasing. ([caa.co.za](https://www.caa.co.za/industry-information/uas/))
22. Transformation of the Defence Forces: How Ukraine Changed Its System - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
23. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.

24. Safe-T Drone Power Station - Elistair
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
25. Safe-T 2 - Advanced Tethering System Brochure
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
26. UAV/UGV Products - Advanced Microwave Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
27. Aquila20 FPV Kit - BETAFPV
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.

28. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
29. UAV Data Link and Unmanned Communications - DTC, a Codan Company
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.

30. Summary - ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
31. Mynaric AG - Annual Report 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
32. General Atomics and Kepler Communications Successfully Demonstrate Air-to-Space Optical Communications Capability
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
33. Doodle Labs Announces Launch of Reseller Program
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.

34. Where To Buy - DJI
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
35. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 announcement assigns provisioning, billing and integration responsibilities, supporting a managed value-added channel mechanism without measured penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced delivery relationship concerns a dedicated satellite communications service; it supports a forecast premise, not realized 2032 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March 2026 collaboration names provisioning, billing, monitoring and lifecycle duties, supporting a provider-management commercial premise without disclosing penetration.
36. Statement: Spectrum for Unmanned Aircraft Systems - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An intermediary cannot independently grant network permission, limiting the forecast transfer of customer obligations.
37. DJI O4 Air Unit Series - FAQ
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.

38. Read Our Terms & Conditions - Elsight
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
39. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
40. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.

41. DJI Agriculture Reveals Global Adoption of Agricultural Drones Cuts 51Mt in Carbon Emissions and Saves 410Mts of Water for Farmers Globally
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
42. DJI Agriculture's Annual Report Reveals Drone-Powered Farming Revolution at Brazil's Agrishow 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
43. EHang Reports Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results - SEC Exhibit 99.1
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
44. Zipline to Triple U.S. Manufacturing Facility, Creating More Jobs in AI and Robotics
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
45. Swisscom Broadcast and Nokia Build Joint Drone Network Across Switzerland
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.

46. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
47. UAS Operator Radio Licence Guidance - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
48. Class Licences - Australian Communications and Media Authority
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
49. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.

50. Defence Procurement Agency DOT - Official Post on Fiber-Optic Drone Procurement and 2025 Deliveries
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
51. ITU-T Y.4215 - Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
52. IFRC Drones Group
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
53. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.

18.4. European Union

Table 330. European Union Drone Data Link System Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Austria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bulgaria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Croatia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cyprus	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Czech Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Estonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Greece	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hungary	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ireland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latvia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lithuania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Luxembourg	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malta	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Romania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovakia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovenia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 331. European Union Drone Data Link System Market Size, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
Austria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bulgaria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Croatia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cyprus	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Czech Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Estonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Greece	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hungary	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ireland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latvia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lithuania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Luxembourg	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malta	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Romania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovakia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovenia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 332. European Union Drone Data Link System Market Size, by Offering, 2017-2032 (USD Million)

Offering	2023	2024	2025	2026	2027	2032	CAGR (%)
Connectivity Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integration & Lifecycle Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Management & Transmission Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 333. European Union Drone Data Link System Market Size, by Data Link Hardware, 2017-2032 (USD Million)

Data Link Hardware	2023	2024	2025	2026	2027	2032	CAGR (%)
Complete Data Link Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Terminals & Modules	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Support Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 334. European Union Drone Data Link System Market Size, by Connectivity Technology, 2017-2032 (USD Million)

Connectivity Technology	2023	2024	2025	2026	2027	2032	CAGR (%)
Cellular Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Free-Space Optical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Multibearer Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Noncellular Radio Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Optical Fiber Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Satellite RF Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wired Electrical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 335. European Union Drone Data Link System Market Size, by Noncellular Radio Communications, 2017-2032 (USD Million)

Noncellular Radio Communications	2023	2024	2025	2026	2027	2032	CAGR (%)
Analog Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Analog & Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 336. European Union Drone Data Link System Market Size, by Network Topology, 2017-2032 (USD Million)

Network Topology	2023	2024	2025	2026	2027	2032	CAGR (%)
Centralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Decentralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Topologies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Point-to-Point Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 337. European Union Drone Data Link System Market Size, by Link Function, 2017-2032 (USD Million)

Link Function	2023	2024	2025	2026	2027	2032	CAGR (%)
Flight-Management Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Flight & Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mission Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 338. European Union Drone Data Link System Market Size, by Mission Application, 2017-2032 (USD Million)

Mission Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Agriculture & Forestry	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combat Operations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Communications Relay	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education, Training & Technology Development	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Inspection & Maintenance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intelligence, Surveillance & Reconnaissance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Media Production & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Sport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific Research & Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Search, Rescue & Emergency Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Surveying & Mapping	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transport & Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 339. European Union Drone Data Link System Market Size, by Transport & Logistics, 2017-2032 (USD Million)

Transport & Logistics	2023	2024	2025	2026	2027	2032	CAGR (%)
Cargo Transport & Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Uncrewed Passenger Transport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 340. European Union Drone Data Link System Market Size, by End User, 2017-2032 (USD Million)

End User	2023	2024	2025	2026	2027	2032	CAGR (%)
Civilian Government & Public Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Enterprises & Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Individual & Household Consumers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Military & Defense Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonprofit Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 341. European Union Drone Data Link System Market Size, by Deployment Model, 2017-2032 (USD Million)

Deployment Model	2023	2024	2025	2026	2027	2032	CAGR (%)
Customer-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Provider-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 342. European Union Drone Data Link System Market Size, by Sales Channel, 2017-2032 (USD Million)

Sales Channel	2023	2024	2025	2026	2027	2032	CAGR (%)
Distribution and Retail Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supplier-Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Value-Added Reseller and Integrator Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 343. European Union Drone Data Link System Market Size, by Operating Envelope, 2017-2032 (USD Million)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Beyond-Visual-Line-of-Sight Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visual-Line-of-Sight-Only Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 344. European Union Drone Data Link System Market Size, by Spectrum Access, 2017-2032 (USD Million)

Spectrum Access	2023	2024	2025	2026	2027	2032	CAGR (%)
Individually Licensed or Assigned Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
License-Exempt or Generally Authorized Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mixed Spectrum Authorization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
2. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
3. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.

4. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
5. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.

6. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
7. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.

8. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
9. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.

10. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
11. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

12. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.

13. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
- Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

14. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

15. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

16. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
17. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
18. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
19. Latvian Civil Aviation Agency - Growth in Drone Users and Administrative Offences, April 27, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx year-end 2025 operator observation calibrates modeled annual installations and led to a higher working civilian numerator; forecast turnover and services remain assumptions. ([caa.gov.lv](https://www.caa.gov.lv/en/article/rapid-growth-number-uav-or-drone-users-number-administrative-offences-committed-also-increased-significantly-last-year))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx year-end 2025 operator observation calibrates modeled annual installations and led to a higher working civilian numerator; forecast turnover and services remain assumptions. ([caa.gov.lv](https://www.caa.gov.lv/en/article/rapid-growth-number-uav-or-drone-users-number-administrative-offences-committed-also-increased-significantly-last-year))

20. Irish Aviation Authority - Response to Dáil Question 371, January 21, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The authority reports xx.xx registrations during 2025 and lacks a company/individual breakdown; the model does not reinterpret annual registrations as an active aircraft census. ([iaa.ie](https://www.iaa.ie/docs/default-source/publications/corporate-publications/parliamentary-questions/2026-pqs/parliamentary-question-iaa-letter-question-xx.xx.pdf?sfvrsn=96a8cef0_1))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The authority reports xx.xx registrations during 2025 and lacks a company/individual breakdown; the model does not reinterpret annual registrations as an active aircraft census. ([iaa.ie](https://www.iaa.ie/docs/default-source/publications/corporate-publications/parliamentary-questions/2026-pqs/parliamentary-question-iaa-letter-question-xx.xx.pdf?sfvrsn=96a8cef0_1))
21. Transformation of the Defence Forces: How Ukraine Changed Its System - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
22. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
23. Safe-T Drone Power Station - Elistair
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.

24. Safe-T 2 - Advanced Tethering System Brochure
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
25. UAV/UGV Products - Advanced Microwave Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
26. Aquila20 FPV Kit - BETAFPV
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.

27. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
28. UAV Data Link and Unmanned Communications - DTC, a Codan Company
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.

29. Summary - ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
30. Mynaric AG - Annual Report 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
31. General Atomics and Kepler Communications Successfully Demonstrate Air-to-Space Optical Communications Capability
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
32. Doodle Labs Announces Launch of Reseller Program
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.

33. Where To Buy - DJI
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
34. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 announcement assigns provisioning, billing and integration responsibilities, supporting a managed value-added channel mechanism without measured penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced delivery relationship concerns a dedicated satellite communications service; it supports a forecast premise, not realized 2032 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March 2026 collaboration names provisioning, billing, monitoring and lifecycle duties, supporting a provider-management commercial premise without disclosing penetration.
35. Statement: Spectrum for Unmanned Aircraft Systems - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An intermediary cannot independently grant network permission, limiting the forecast transfer of customer obligations.
36. DJI O4 Air Unit Series - FAQ
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.

37. Read Our Terms & Conditions - Elsight
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
38. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
39. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.

40. DJI Agriculture Reveals Global Adoption of Agricultural Drones Cuts 51Mt in Carbon Emissions and Saves 410Mts of Water for Farmers Globally
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
41. DJI Agriculture's Annual Report Reveals Drone-Powered Farming Revolution at Brazil's Agrishow 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
42. EHang Reports Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results - SEC Exhibit 99.1
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
43. Zipline to Triple U.S. Manufacturing Facility, Creating More Jobs in AI and Robotics
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
44. Swisscom Broadcast and Nokia Build Joint Drone Network Across Switzerland
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.

45. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
46. UAS Operator Radio Licence Guidance - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
47. Class Licences - Australian Communications and Media Authority
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
48. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.

49. Defence Procurement Agency DOT - Official Post on Fiber-Optic Drone Procurement and 2025 Deliveries
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
50. ITU-T Y.4215 - Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
51. IFRC Drones Group
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
52. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.

18.5. GCC

Table 345. GCC Drone Data Link System Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Bahrain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Kuwait	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oman	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Qatar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Saudi Arabia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Arab Emirates	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 346. GCC Drone Data Link System Market Size, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
Bahrain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Kuwait	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oman	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Qatar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Saudi Arabia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Arab Emirates	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 347. GCC Drone Data Link System Market Size, by Offering, 2017-2032 (USD Million)

Offering	2023	2024	2025	2026	2027	2032	CAGR (%)
Connectivity Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integration & Lifecycle Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Management & Transmission Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 348. GCC Drone Data Link System Market Size, by Data Link Hardware, 2017-2032 (USD Million)

Data Link Hardware	2023	2024	2025	2026	2027	2032	CAGR (%)
Complete Data Link Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Terminals & Modules	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Support Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 349. GCC Drone Data Link System Market Size, by Connectivity Technology, 2017-2032 (USD Million)

Connectivity Technology	2023	2024	2025	2026	2027	2032	CAGR (%)
Cellular Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Free-Space Optical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Multibearer Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Noncellular Radio Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Optical Fiber Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Satellite RF Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wired Electrical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 350. GCC Drone Data Link System Market Size, by Noncellular Radio Communications, 2017-2032 (USD Million)

Noncellular Radio Communications	2023	2024	2025	2026	2027	2032	CAGR (%)
Analog Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Analog & Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 351. GCC Drone Data Link System Market Size, by Network Topology, 2017-2032 (USD Million)

Network Topology	2023	2024	2025	2026	2027	2032	CAGR (%)
Centralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Decentralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Topologies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Point-to-Point Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 352. GCC Drone Data Link System Market Size, by Link Function, 2017-2032 (USD Million)

Link Function	2023	2024	2025	2026	2027	2032	CAGR (%)
Flight-Management Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Flight & Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mission Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 353. GCC Drone Data Link System Market Size, by Mission Application, 2017-2032 (USD Million)

Mission Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Agriculture & Forestry	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combat Operations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Communications Relay	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education, Training & Technology Development	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Inspection & Maintenance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intelligence, Surveillance & Reconnaissance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Media Production & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Sport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific Research & Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Search, Rescue & Emergency Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Surveying & Mapping	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transport & Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 354. GCC Drone Data Link System Market Size, by Transport & Logistics, 2017-2032 (USD Million)

Transport & Logistics	2023	2024	2025	2026	2027	2032	CAGR (%)
Cargo Transport & Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Uncrewed Passenger Transport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 355. GCC Drone Data Link System Market Size, by End User, 2017-2032 (USD Million)

End User	2023	2024	2025	2026	2027	2032	CAGR (%)
Civilian Government & Public Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Enterprises & Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Individual & Household Consumers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Military & Defense Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonprofit Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 356. GCC Drone Data Link System Market Size, by Deployment Model, 2017-2032 (USD Million)

Deployment Model	2023	2024	2025	2026	2027	2032	CAGR (%)
Customer-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Provider-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 357. GCC Drone Data Link System Market Size, by Sales Channel, 2017-2032 (USD Million)

Sales Channel	2023	2024	2025	2026	2027	2032	CAGR (%)
Distribution and Retail Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supplier-Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Value-Added Reseller and Integrator Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 358. GCC Drone Data Link System Market Size, by Operating Envelope, 2017-2032 (USD Million)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Beyond-Visual-Line-of-Sight Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visual-Line-of-Sight-Only Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 359. GCC Drone Data Link System Market Size, by Spectrum Access, 2017-2032 (USD Million)

Spectrum Access	2023	2024	2025	2026	2027	2032	CAGR (%)
Individually Licensed or Assigned Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
License-Exempt or Generally Authorized Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mixed Spectrum Authorization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
2. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
3. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.

4. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
5. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.

6. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
7. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.

8. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
9. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.

10. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
11. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

12. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.

13. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
- Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

14. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

15. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

16. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
17. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
18. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
19. UAS Registration - General Civil Aviation Authority of UAE
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator authorization is distinct from mission permission, qualifying the modeled UAE enterprise-service adoption premise rather than establishing paid deployment. ([gcaa.ae](https://gcaa.ae/en/pages/UASRegistration.aspx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator authorization is distinct from mission permission, qualifying the modeled UAE enterprise-service adoption premise rather than establishing paid deployment. ([gcaa.ae](https://gcaa.ae/en/pages/UASRegistration.aspx))

20. Transformation of the Defence Forces: How Ukraine Changed Its System - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
21. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
22. Safe-T Drone Power Station - Elistair
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
23. Safe-T 2 - Advanced Tethering System Brochure
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.

24. UAV/UGV Products - Advanced Microwave Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
25. Aquila20 FPV Kit - BETAFPV
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.

26. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
27. UAV Data Link and Unmanned Communications - DTC, a Codan Company
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.

28. Summary - ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
29. Mynaric AG - Annual Report 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
30. General Atomics and Kepler Communications Successfully Demonstrate Air-to-Space Optical Communications Capability
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
31. Doodle Labs Announces Launch of Reseller Program
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.

32. Where To Buy - DJI
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
33. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 announcement assigns provisioning, billing and integration responsibilities, supporting a managed value-added channel mechanism without measured penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced delivery relationship concerns a dedicated satellite communications service; it supports a forecast premise, not realized 2032 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March 2026 collaboration names provisioning, billing, monitoring and lifecycle duties, supporting a provider-management commercial premise without disclosing penetration.
34. Statement: Spectrum for Unmanned Aircraft Systems - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An intermediary cannot independently grant network permission, limiting the forecast transfer of customer obligations.
35. DJI O4 Air Unit Series - FAQ
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.

36. Read Our Terms & Conditions - Elsight
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
37. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
38. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.

39. DJI Agriculture Reveals Global Adoption of Agricultural Drones Cuts 51Mt in Carbon Emissions and Saves 410Mts of Water for Farmers Globally
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
40. DJI Agriculture's Annual Report Reveals Drone-Powered Farming Revolution at Brazil's Agrishow 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
41. EHang Reports Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results - SEC Exhibit 99.1
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
42. Zipline to Triple U.S. Manufacturing Facility, Creating More Jobs in AI and Robotics
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
43. Swisscom Broadcast and Nokia Build Joint Drone Network Across Switzerland
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.

44. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
45. UAS Operator Radio Licence Guidance - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
46. Class Licences - Australian Communications and Media Authority
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
47. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.

48. Defence Procurement Agency DOT - Official Post on Fiber-Optic Drone Procurement and 2025 Deliveries
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
49. ITU-T Y.4215 - Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
50. IFRC Drones Group
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
51. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.

18.6. ASEAN

Table 360. ASEAN Drone Data Link System Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Brunei	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cambodia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indonesia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lao People's Democratic Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malaysia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Myanmar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Philippines	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Singapore	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Thailand	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vietnam	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 361. ASEAN Drone Data Link System Market Size, by Group, 2017-2032 (USD Million)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
Brunei	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cambodia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indonesia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lao People's Democratic Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malaysia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Myanmar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Philippines	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Singapore	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Thailand	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vietnam	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 362. ASEAN Drone Data Link System Market Size, by Offering, 2017-2032 (USD Million)

Offering	2023	2024	2025	2026	2027	2032	CAGR (%)
Connectivity Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integration & Lifecycle Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Management & Transmission Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 363. ASEAN Drone Data Link System Market Size, by Data Link Hardware, 2017-2032 (USD Million)

Data Link Hardware	2023	2024	2025	2026	2027	2032	CAGR (%)
Complete Data Link Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Terminals & Modules	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Support Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 364. ASEAN Drone Data Link System Market Size, by Connectivity Technology, 2017-2032 (USD Million)

Connectivity Technology	2023	2024	2025	2026	2027	2032	CAGR (%)
Cellular Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Free-Space Optical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Multibearer Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Noncellular Radio Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Optical Fiber Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Satellite RF Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wired Electrical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 365. ASEAN Drone Data Link System Market Size, by Noncellular Radio Communications, 2017-2032 (USD Million)

Noncellular Radio Communications	2023	2024	2025	2026	2027	2032	CAGR (%)
Analog Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Analog & Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 366. ASEAN Drone Data Link System Market Size, by Network Topology, 2017-2032 (USD Million)

Network Topology	2023	2024	2025	2026	2027	2032	CAGR (%)
Centralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Decentralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Topologies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Point-to-Point Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 367. ASEAN Drone Data Link System Market Size, by Link Function, 2017-2032 (USD Million)

Link Function	2023	2024	2025	2026	2027	2032	CAGR (%)
Flight-Management Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Flight & Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mission Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 368. ASEAN Drone Data Link System Market Size, by Mission Application, 2017-2032 (USD Million)

Mission Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Agriculture & Forestry	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combat Operations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Communications Relay	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education, Training & Technology Development	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Inspection & Maintenance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intelligence, Surveillance & Reconnaissance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Media Production & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Sport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific Research & Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Search, Rescue & Emergency Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Surveying & Mapping	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transport & Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 369. ASEAN Drone Data Link System Market Size, by Transport & Logistics, 2017-2032 (USD Million)

Transport & Logistics	2023	2024	2025	2026	2027	2032	CAGR (%)
Cargo Transport & Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Uncrewed Passenger Transport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 370. ASEAN Drone Data Link System Market Size, by End User, 2017-2032 (USD Million)

End User	2023	2024	2025	2026	2027	2032	CAGR (%)
Civilian Government & Public Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Enterprises & Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Individual & Household Consumers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Military & Defense Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonprofit Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 371. ASEAN Drone Data Link System Market Size, by Deployment Model, 2017-2032 (USD Million)

Deployment Model	2023	2024	2025	2026	2027	2032	CAGR (%)
Customer-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Provider-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 372. ASEAN Drone Data Link System Market Size, by Sales Channel, 2017-2032 (USD Million)

Sales Channel	2023	2024	2025	2026	2027	2032	CAGR (%)
Distribution and Retail Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supplier-Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Value-Added Reseller and Integrator Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 373. ASEAN Drone Data Link System Market Size, by Operating Envelope, 2017-2032 (USD Million)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Beyond-Visual-Line-of-Sight Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visual-Line-of-Sight-Only Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 374. ASEAN Drone Data Link System Market Size, by Spectrum Access, 2017-2032 (USD Million)

Spectrum Access	2023	2024	2025	2026	2027	2032	CAGR (%)
Individually Licensed or Assigned Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
License-Exempt or Generally Authorized Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mixed Spectrum Authorization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
2. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
3. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.

4. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
5. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.

6. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
7. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.

8. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
9. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.

10. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
11. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

12. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.

13. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
- Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

14. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

15. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

16. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
17. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
18. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
19. Operator and Activity Permits - Civil Aviation Authority of Singapore
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator/activity permits and the required flight-management-service relationship constrain Singapore's addressable paid-service premise; no ASEAN-wide entitlement or revenue observation is inferred. ([caas.gov.sg](https://www.caas.gov.sg/unmanned-aircraft/operator-and-activity-permits/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator/activity permits and the required flight-management-service relationship constrain Singapore's addressable paid-service premise; no ASEAN-wide entitlement or revenue observation is inferred. ([caas.gov.sg](https://www.caas.gov.sg/unmanned-aircraft/operator-and-activity-permits/))

20. Transformation of the Defence Forces: How Ukraine Changed Its System - Ministry of Defence of Ukraine
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.

21. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.

22. Safe-T Drone Power Station - Elistair
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.

23. Safe-T 2 - Advanced Tethering System Brochure
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.

24. UAV/UGV Products - Advanced Microwave Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
25. Aquila20 FPV Kit - BETAFPV
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.

26. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
27. UAV Data Link and Unmanned Communications - DTC, a Codan Company
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.

28. Summary - ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
29. Mynaric AG - Annual Report 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
30. General Atomics and Kepler Communications Successfully Demonstrate Air-to-Space Optical Communications Capability
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
31. Doodle Labs Announces Launch of Reseller Program
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.

32. Where To Buy - DJI
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
33. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 announcement assigns provisioning, billing and integration responsibilities, supporting a managed value-added channel mechanism without measured penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced delivery relationship concerns a dedicated satellite communications service; it supports a forecast premise, not realized 2032 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March 2026 collaboration names provisioning, billing, monitoring and lifecycle duties, supporting a provider-management commercial premise without disclosing penetration.
34. Statement: Spectrum for Unmanned Aircraft Systems - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An intermediary cannot independently grant network permission, limiting the forecast transfer of customer obligations.
35. DJI O4 Air Unit Series - FAQ
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.

36. Read Our Terms & Conditions - Elsight
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
37. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
38. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.

39. DJI Agriculture Reveals Global Adoption of Agricultural Drones Cuts 51Mt in Carbon Emissions and Saves 410Mts of Water for Farmers Globally
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
40. DJI Agriculture's Annual Report Reveals Drone-Powered Farming Revolution at Brazil's Agrishow 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
41. EHang Reports Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results - SEC Exhibit 99.1
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
42. Zipline to Triple U.S. Manufacturing Facility, Creating More Jobs in AI and Robotics
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
43. Swisscom Broadcast and Nokia Build Joint Drone Network Across Switzerland
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.

44. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
45. UAS Operator Radio Licence Guidance - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
46. Class Licences - Australian Communications and Media Authority
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
47. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.

48. Defence Procurement Agency DOT - Official Post on Fiber-Optic Drone Procurement and 2025 Deliveries
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
49. ITU-T Y.4215 - Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
50. IFRC Drones Group
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
51. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.

19. Drone Data Link System Market, by Country

United States entry requires separating product eligibility, government purchasing and civil flight permission. ■■■ ■■■■■ ■■■■■ ■■ ■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■ ■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■ ■■■ ■■■ ■■■■■■■■ ■ ■■■■■ ■■■ ■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■ ■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■ Domestic sourcing or a screening announcement cannot alone settle every requirement; existing authorization and applicable exemptions can favor retention rather than blanket replacement.

Canada provides a defined lower-risk BVLOS pathway rather than unrestricted remote-operation permission. ■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■ ■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■■ ■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■ ■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■ A customer's proposed locations and certificate coverage should determine whether to proceed under this pathway or assess a different authorization route.

■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■ ■■■ ■■■■■■ ■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■ ■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■ ■ ■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■ ■■ ■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ An integrator can coordinate the submissions, but cannot replace the authorities' decisions; direct component purchasing retains that coordination with the buyer. Confined-area operations remove the DECEA airspace-authorization requirement, not the ANAC and ANATEL responsibilities.

For a German operator serving a French customer, EASA's specific-category framework preserves home-state approval while retaining destination conditions. Operations outside standard scenarios require French confirmation of the cross-border application; standard-scenario and qualifying LUC routes have simpler documentary requirements. ■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■ ■■■■■■ ■■■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■

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[illegible] A managed-connectivity contract should allocate carrier-consent and authorization-renewal duties separately. Existing radio exemptions remain alternatives where applicable, while a UK licence cannot establish access in another country.

[illegible] The announcement distinguishes existing customized services from prospective network deployment; it does not establish completed nationwide availability. Bundling exchanges purchasing simplicity for provider dependence.

China's communications-access rules distinguish product approval from service eligibility. MIIT requires type approval for covered UAS radio transmitters supplied for domestic sale or use, subject to stated exemptions, and requires cellular and satellite services lawfully available in China. [illegible]

India treats separately supplied components differently from complete or knocked-down drones. The February xx.xx 2022 import notification prohibits the latter subject to specified exceptions while classifying drone-component imports as Free. [illegible]

[illegible] A link supplier should establish the intended aircraft program's category before offering a deployment-dependent commitment. Participation in a qualifying program can simplify access, but category similarity does not confer another program's permission.

Australia requires flight approval and cellular acceptance to be established independently. [redacted] Class-authorized equipment can simplify spectrum administration, but neither equipment purchase nor aviation approval guarantees usable carrier service.

Singapore adds a mandatory service relationship to commercial deployment. [redacted] Activity permits can cover repeated activities, supporting recurring service contracts, but remain bounded by their approved locations, operation types and schedules.

For United Arab Emirates inspection, surveying and media customers, information capture creates an additional approval condition. GCAA states that an Unmanned Aircraft Operator Authorisation does not itself authorize flight and requires security approval for activities using capturing devices, including video streaming, regardless of red or green flying-zone status. [redacted]

[redacted] Link vendors should identify the approved operating organization behind the ultimate customer before accepting deployment-dependent orders. Contracting with an appropriately authorized service operator can address this organizational requirement, but adds delegation and does not make a pilot licence sufficient by itself.

[redacted] A Kenya-registered purchaser can satisfy the stated corporate ownership category, but that does not replace import permission. Direct supply remains a conditional option when the purchaser and shipment meet the applicable requirements.

Figure 39. Global Drone Data Link System Market Size, by Country, 2025 vs 2032 (%)

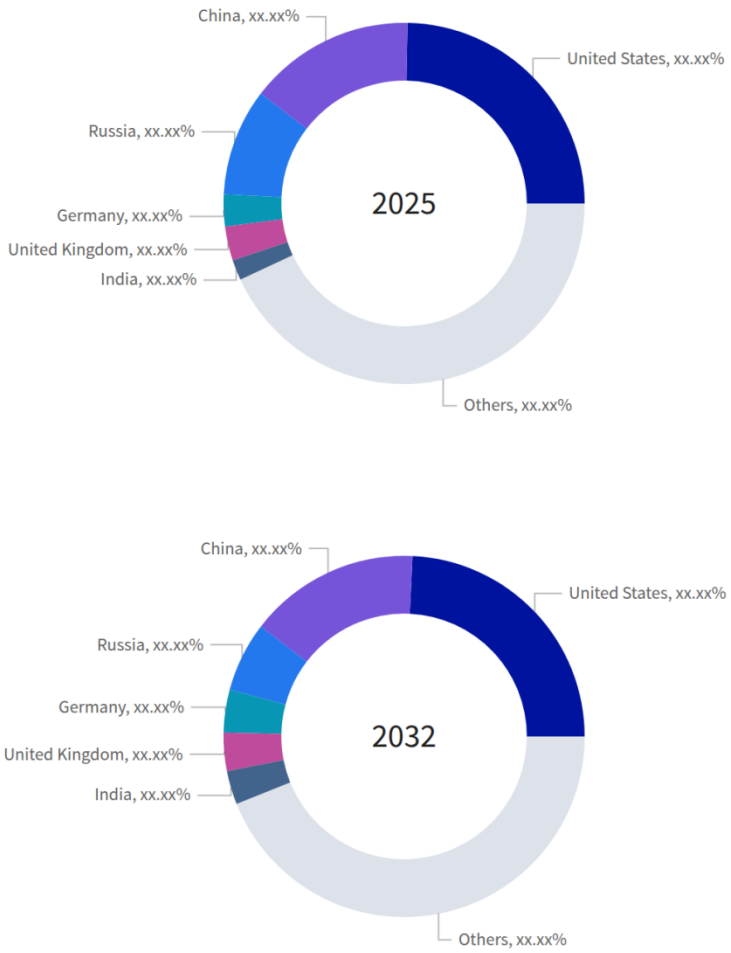

Figure 40. Global Drone Data Link System Market Size, by Country, 2025 vs 2026 vs 2032

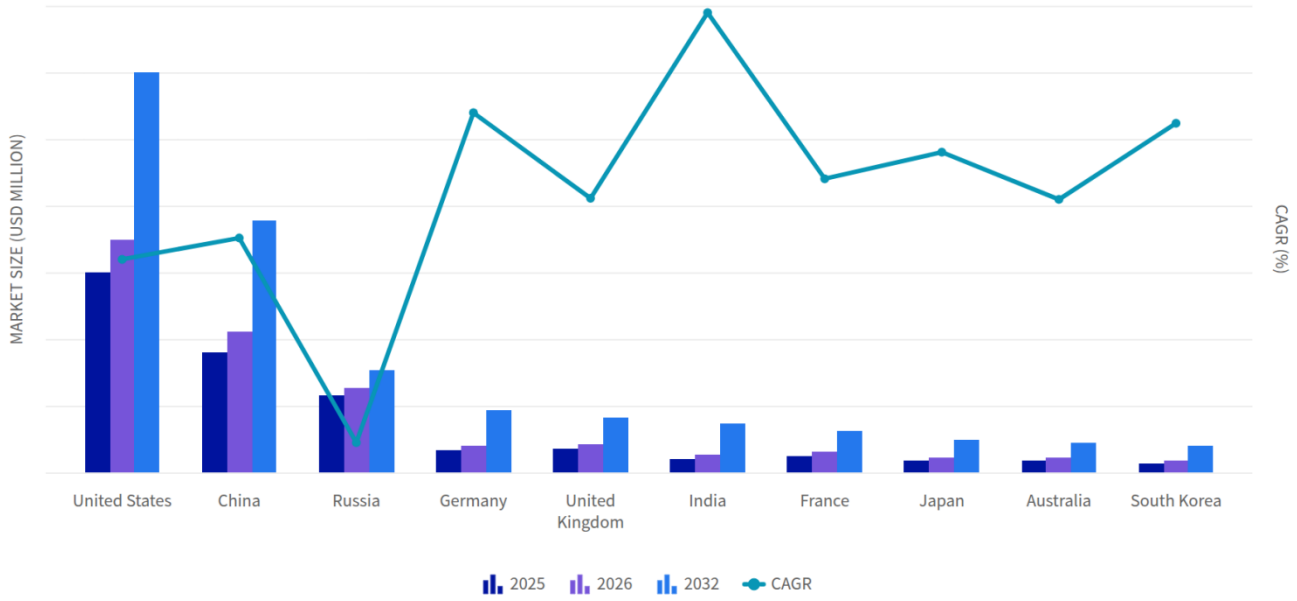

Figure 41. Global Drone Data Link System Market, Forecast growth by country, 2025-2032 (CAGR %)

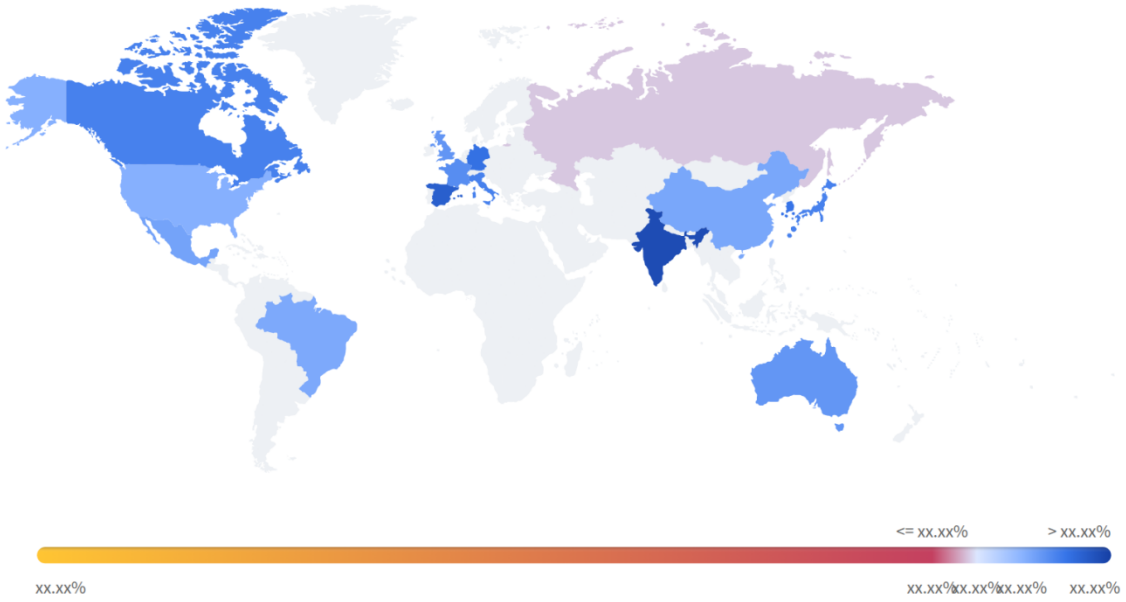

Table 375. Global Drone Data Link System Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 376. Global Drone Data Link System Market Size, by Country, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Swisscom Broadcast and Nokia build joint drone network across Switzerland

   · Swisscom's August xx.xx 2024 announcement combines infrastructure, authorization-application support and storage, distinguishing existing customized services from prospective network deployment. ([swisscom.ch](https://www.swisscom.ch/en/about/news/2024/xx.xx/xx.xx-drohnennetzwerk-schweiz.html))

2. Part 107 Waivers

   · FAA operational waivers permit specified deviations from Part xx.xx including its visual-line-of-sight requirement; equipment availability does not provide that permission. ([faa.gov](https://www.faa.gov/uas/commercial_operators/part_107_waivers))

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.

   · Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.

3. Beyond visual line-of-sight operations

   · CASA identifies operator certification, pilot qualification and BVLOS flight approval as separate requirements and describes an eligible broader-area approval pathway. ([casa.gov.au](https://www.casa.gov.au/drones/flight-authorisations/beyond-visual-line-sight-operations))

4. Spectrum policy
   - Australian guidance describes class-authorized equipment and makes cellular suitability dependent on network-operator admission and coverage for the application. ([drones.gov.au](https://www.drones.gov.au/policies-and-programs/policies/spectrum-policy))
5. Statement: Spectrum for Unmanned Aircraft Systems (UAS)
   - Ofcom's UAS radio licence covers UK operations and territorial waters, excludes international flights, requires covered network-operator agreement and preserves existing radio exemptions. ([ofcom.org.uk](https://www.ofcom.org.uk/spectrum/radio-equipment/spectrum-for-unmanned-aircraft-systems))
6. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
   - DIU distinguishes the Blue UAS Framework's components and software from complete aircraft and separates verification candidates from completed additions. ([diu.mil](https://www.diu.mil/latest/blue-uas-refresh-list-and-framework-platforms-and-capabilities-selected))
7. 2025 Summary of changes to Canada’s drone regulations
   - Canadian rules effective November xx.xx 2025 permit qualifying lower-risk BVLOS operations without an SFOC, subject to Level xx.xx Complex certification, an RPOC and operating-environment restrictions. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
8. Operator and activity permits
   - CAAS links Class xx.xx Activity Permits to Operator Permits, requires Operator Permit holders to subscribe to CFMS, and allows permits covering repeated activities. ([caas.gov.sg](https://www.caas.gov.sg/unmanned-aircraft/operator-and-activity-permits/))
9. UAS Registration
   - GCAA states that operator authorization does not authorize flight and requires security approval for capturing-device activities regardless of red or green zone status. ([gcaa.ae](https://gcaa.ae/en/pages/UASRegistration.aspx))
10. Unmanned Aircraft Systems
    - SACAA's approval table requires UASOC and aircraft-related approvals for commercial, corporate and nonprofit operations, but identifies an Air Service Licence specifically for commercial operations. ([caa.co.za](https://www.caa.co.za/industry-information/uas/))
11. Operations in the specific category in a state different from the one of registration
    - EASA distinguishes destination confirmation for non-standard-scenario cross-border operations from simpler standard-scenario and qualifying LUC documentation, while retaining local conditions and geographic zones. ([easa.europa.eu](https://www.easa.europa.eu/en/domains/drones-air-mobility/operating-drone/specific-category-civil-drones/operations-specific-category-state-different-one-registration))
12. Unleashing American Drone Dominance - FCC Notice and Request for Comments
    - The FCC notice released April xx.xx 2026 records foreign-produced UAS and critical-component authorization restrictions, exemptions and continued use of already-authorized devices; communications systems are included. ([public-inspection.federalregister.gov](https://public-inspection.federalregister.gov/2026-xx.xx.pdf))

13. Quais autorizações são necessárias antes de solicitar um voo de drone ao DECEA?

· DECEA identifies ANATEL and ANAC approvals before open-air RPAS airspace requests; confined-area operations do not require DECEA airspace authorization.
([ajuda.decea.mil.br](https://ajuda.decea.mil.br/base-de-conhecimento/quais-autorizacoes-sao-necessarias-antes-de-solicitar-um-voo-de-drone-ao-decea/))

14. UK SORA-based Operational Authorisations

· UK SORA replaced the OSC application method on April xx.xx 2025; operational authorizations issued through the stated route last twelve months.
([caa.co.uk](https://www.caa.co.uk/drones/specific-category/uk-sora-based-operational-authorisations/uk-sora-based-operational-authorisations/))

15. 工业和信息化部关于印发《民用无人驾驶航空器无线电管理暂行办法》的通知

· MIIT requires approval for covered UAS radio transmitters, subject to exemptions, lawfully available Chinese cellular or satellite services, and UAS-specific SIMs for cellular access.
([miit.gov.cn](https://www.miit.gov.cn/jgsj/wgj/wjfb/art/2024/art_1c3a092d3bcd4d41abe69c369ba7bab6.html))

16. Annexures to DGFT Notification No. 54/2015-20 dated February 9, 2022

· DGFT Notification No. xx.xx/2015-xx.xx dated February xx.xx 2022 prohibits complete and knocked-down drone imports subject to specified exceptions and classifies component imports as Free.
([apeda.gov.in](https://apeda.gov.in/sites/default/files/dgft_notifications/Eng_Notification54_dated_9Feb2022_ITC_HS_with_Annexures.pdf))

17. Equipment Type Approval (ETA)

· WPC's equipment-approval service expressly excludes drones and satellite equipment from its ordinary ETA self-declaration route, supporting separate offering-classification diligence.
([eservices.dot.gov.in](https://eservices.dot.gov.in/equipment-type-approval-eta))

18. Unmanned Aircraft Flight Permission/Approval Application Web portal

· MLIT distinguishes conditional Category II permission relief from Category III requirements for Class I pilot certification, Class xx.xx aircraft certification and ministerial approval.
([mlit.go.jp](https://www.mlit.go.jp/koku/permitapproval/en/index.html))

19. Kenya Civil Aviation Authority - UAS Manual of Implementing Standards

· KCAA requires permits for UAS or component imports and identifies eligible aircraft owners, including Kenyan citizens or residents, Kenya-registered companies and government bodies.
([kcaa.or.ke](https://www.kcaa.or.ke/sites/default/files/docs/uas/Manual%20of%20Implementing%20Standards%xx.xx%28MIS%xx.xx.pdf))

20. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China

· Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))

21. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
    - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
22. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.
23. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
24. Telemetry Radios - Holybro Store
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
25. Motorola Solutions - March 2, 2026 Conference Transcript
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
26. Codan FY2025 Results - ASX Announcement, August 21, 2025
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.

27. Codan H1 FY2026 Investor Presentation - February 19, 2026
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
· Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
28. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
29. Elsight Limited - Appendix 4E and Annual Report 2025
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
30. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.
31. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
· Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
32. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
· Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
33. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
· Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
34. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
· Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
· Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.
35. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
· Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

36. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))

37. Civil Aviation Safety Authority Annual Report 2024-25

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))

38. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

39. Declaração de Conformidade para Uso Próprio - Anatel

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))

40. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))

19.1. United States

Table 377. United States Drone Data Link System Market Size, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
United States	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 378. United States Drone Data Link System Market Size, by Offering, 2017-2032 (USD Million)

Offering	2023	2024	2025	2026	2027	2032	CAGR (%)
Connectivity Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integration & Lifecycle Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Management & Transmission Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 379. United States Drone Data Link System Market Size, by Data Link Hardware, 2017-2032 (USD Million)

Data Link Hardware	2023	2024	2025	2026	2027	2032	CAGR (%)
Complete Data Link Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Terminals & Modules	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Support Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 380. United States Drone Data Link System Market Size, by Connectivity Technology, 2017-2032 (USD Million)

Connectivity Technology	2023	2024	2025	2026	2027	2032	CAGR (%)
Cellular Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Free-Space Optical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Multibearer Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Noncellular Radio Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Optical Fiber Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Satellite RF Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wired Electrical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 381. United States Drone Data Link System Market Size, by Noncellular Radio Communications, 2017-2032 (USD Million)

Noncellular Radio Communications	2023	2024	2025	2026	2027	2032	CAGR (%)
Analog Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Analog & Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 382. United States Drone Data Link System Market Size, by Network Topology, 2017-2032 (USD Million)

Network Topology	2023	2024	2025	2026	2027	2032	CAGR (%)
Centralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Decentralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Topologies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Point-to-Point Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 383. United States Drone Data Link System Market Size, by Link Function, 2017-2032 (USD Million)

Link Function	2023	2024	2025	2026	2027	2032	CAGR (%)
Flight-Management Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Flight & Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mission Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 384. United States Drone Data Link System Market Size, by Mission Application, 2017-2032 (USD Million)

Mission Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Agriculture & Forestry	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combat Operations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Communications Relay	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education, Training & Technology Development	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Inspection & Maintenance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intelligence, Surveillance & Reconnaissance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Media Production & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Sport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific Research & Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Search, Rescue & Emergency Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Surveying & Mapping	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transport & Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 385. United States Drone Data Link System Market Size, by Transport & Logistics, 2017-2032 (USD Million)

Transport & Logistics	2023	2024	2025	2026	2027	2032	CAGR (%)
Cargo Transport & Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Uncrewed Passenger Transport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 386. United States Drone Data Link System Market Size, by End User, 2017-2032 (USD Million)

End User	2023	2024	2025	2026	2027	2032	CAGR (%)
Civilian Government & Public Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Enterprises & Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Individual & Household Consumers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Military & Defense Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonprofit Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 387. United States Drone Data Link System Market Size, by Deployment Model, 2017-2032 (USD Million)

Deployment Model	2023	2024	2025	2026	2027	2032	CAGR (%)
Customer-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Provider-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 388. United States Drone Data Link System Market Size, by Sales Channel, 2017-2032 (USD Million)

Sales Channel	2023	2024	2025	2026	2027	2032	CAGR (%)
Distribution and Retail Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supplier-Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Value-Added Reseller and Integrator Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 389. United States Drone Data Link System Market Size, by Operating Envelope, 2017-2032 (USD Million)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Beyond-Visual-Line-of-Sight Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visual-Line-of-Sight-Only Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 390. United States Drone Data Link System Market Size, by Spectrum Access, 2017-2032 (USD Million)

Spectrum Access	2023	2024	2025	2026	2027	2032	CAGR (%)
Individually Licensed or Assigned Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
License-Exempt or Generally Authorized Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mixed Spectrum Authorization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
2. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Effective versus cumulative commercial fleet counts and projected maturation constrain U.S. installations and the forecast's civilian hardware contribution; they are not direct market shares. ([faa.gov](https://www.faa.gov/data_research/aviation/aerospace_forecasts/2025-uas-and-aam-full-document.pdf))
3. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.

4. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
5. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.

6. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
7. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.

8. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
9. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.

10. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
11. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

12. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.

13. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
- Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

14. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

15. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

16. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
17. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
18. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
19. Small Unmanned Aircraft Systems Survey Report 2023 - Federal Aviation Administration
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Registry sampling excludes some populations, including DoD operators, and cross-state activity is common; civilian flight-location data cannot alone allocate the full U.S. equipment/services numerator. ([faa.gov](https://www.faa.gov/media/xx.xx))

20. Transformation of the Defence Forces: How Ukraine Changed Its System - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
21. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
22. Safe-T Drone Power Station - Elistair
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
23. Safe-T 2 - Advanced Tethering System Brochure
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.

24. UAV/UGV Products - Advanced Microwave Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
25. Aquila20 FPV Kit - BETAFPV
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.

26. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
27. UAV Data Link and Unmanned Communications - DTC, a Codan Company
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.

28. Summary - ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
29. Mynaric AG - Annual Report 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
30. General Atomics and Kepler Communications Successfully Demonstrate Air-to-Space Optical Communications Capability
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
31. Doodle Labs Announces Launch of Reseller Program
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.

32. Where To Buy - DJI
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
33. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 announcement assigns provisioning, billing and integration responsibilities, supporting a managed value-added channel mechanism without measured penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced delivery relationship concerns a dedicated satellite communications service; it supports a forecast premise, not realized 2032 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March 2026 collaboration names provisioning, billing, monitoring and lifecycle duties, supporting a provider-management commercial premise without disclosing penetration.
34. Statement: Spectrum for Unmanned Aircraft Systems - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An intermediary cannot independently grant network permission, limiting the forecast transfer of customer obligations.
35. DJI O4 Air Unit Series - FAQ
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.

36. Read Our Terms & Conditions - Elsight
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
37. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
38. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.

39. DJI Agriculture Reveals Global Adoption of Agricultural Drones Cuts 51Mt in Carbon Emissions and Saves 410Mts of Water for Farmers Globally
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
40. DJI Agriculture's Annual Report Reveals Drone-Powered Farming Revolution at Brazil's Agrishow 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
41. EHang Reports Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results - SEC Exhibit 99.1
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
42. Zipline to Triple U.S. Manufacturing Facility, Creating More Jobs in AI and Robotics
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
43. Swisscom Broadcast and Nokia Build Joint Drone Network Across Switzerland
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.

44. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
45. UAS Operator Radio Licence Guidance - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
46. Class Licences - Australian Communications and Media Authority
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
47. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.

48. Defence Procurement Agency DOT - Official Post on Fiber-Optic Drone Procurement and 2025 Deliveries
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
49. ITU-T Y.4215 - Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
50. IFRC Drones Group
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
51. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.

19.2. China

Table 391. China Drone Data Link System Market Size, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
China	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 392. China Drone Data Link System Market Size, by Offering, 2017-2032 (USD Million)

Offering	2023	2024	2025	2026	2027	2032	CAGR (%)
Connectivity Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integration & Lifecycle Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Management & Transmission Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 393. China Drone Data Link System Market Size, by Data Link Hardware, 2017-2032 (USD Million)

Data Link Hardware	2023	2024	2025	2026	2027	2032	CAGR (%)
Complete Data Link Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Terminals & Modules	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Support Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 394. China Drone Data Link System Market Size, by Connectivity Technology, 2017-2032 (USD Million)

Connectivity Technology	2023	2024	2025	2026	2027	2032	CAGR (%)
Cellular Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Free-Space Optical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Multibearer Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Noncellular Radio Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Optical Fiber Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Satellite RF Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wired Electrical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 395. China Drone Data Link System Market Size, by Noncellular Radio Communications, 2017-2032 (USD Million)

Noncellular Radio Communications	2023	2024	2025	2026	2027	2032	CAGR (%)
Analog Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Analog & Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 396. China Drone Data Link System Market Size, by Network Topology, 2017-2032 (USD Million)

Network Topology	2023	2024	2025	2026	2027	2032	CAGR (%)
Centralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Decentralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Topologies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Point-to-Point Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 397. China Drone Data Link System Market Size, by Link Function, 2017-2032 (USD Million)

Link Function	2023	2024	2025	2026	2027	2032	CAGR (%)
Flight-Management Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Flight & Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mission Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 398. China Drone Data Link System Market Size, by Mission Application, 2017-2032 (USD Million)

Mission Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Agriculture & Forestry	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combat Operations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Communications Relay	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education, Training & Technology Development	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Inspection & Maintenance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intelligence, Surveillance & Reconnaissance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Media Production & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Sport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific Research & Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Search, Rescue & Emergency Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Surveying & Mapping	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transport & Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 399. China Drone Data Link System Market Size, by Transport & Logistics, 2017-2032 (USD Million)

Transport & Logistics	2023	2024	2025	2026	2027	2032	CAGR (%)
Cargo Transport & Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Uncrewed Passenger Transport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 400. China Drone Data Link System Market Size, by End User, 2017-2032 (USD Million)

End User	2023	2024	2025	2026	2027	2032	CAGR (%)
Civilian Government & Public Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Enterprises & Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Individual & Household Consumers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Military & Defense Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonprofit Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 401. China Drone Data Link System Market Size, by Deployment Model, 2017-2032 (USD Million)

Deployment Model	2023	2024	2025	2026	2027	2032	CAGR (%)
Customer-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Provider-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 402. China Drone Data Link System Market Size, by Sales Channel, 2017-2032 (USD Million)

Sales Channel	2023	2024	2025	2026	2027	2032	CAGR (%)
Distribution and Retail Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supplier-Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Value-Added Reseller and Integrator Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 403. China Drone Data Link System Market Size, by Operating Envelope, 2017-2032 (USD Million)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Beyond-Visual-Line-of-Sight Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visual-Line-of-Sight-Only Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 404. China Drone Data Link System Market Size, by Spectrum Access, 2017-2032 (USD Million)

Spectrum Access	2023	2024	2025	2026	2027	2032	CAGR (%)
Individually Licensed or Assigned Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
License-Exempt or Generally Authorized Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mixed Spectrum Authorization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China

   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
   ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 registered fleet of xx.xx, up xx.xx%, constrains the Chinese domestic installation pool and the starting pool for the forecast; registrations are not sales.
   ([caac.gov.cn](https://www.caac.gov.cn/XXGK/XXGK/TJSJ/xx.xx/P020260417665629030648.pdf))

2. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.

   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.

3. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub

   · Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.

4. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
5. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.

6. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
7. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.

8. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
9. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.

10. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
11. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

12. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.

13. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
- Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

14. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

15. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

16. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
17. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
18. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
19. Transformation of the Defence Forces: How Ukraine Changed Its System - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.

20. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
21. Safe-T Drone Power Station - Elistair
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
22. Safe-T 2 - Advanced Tethering System Brochure
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.

23. UAV/UGV Products - Advanced Microwave Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
24. Aquila20 FPV Kit - BETAFPV
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.

25. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
26. UAV Data Link and Unmanned Communications - DTC, a Codan Company
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.

27. Summary - ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
28. Mynaric AG - Annual Report 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
29. General Atomics and Kepler Communications Successfully Demonstrate Air-to-Space Optical Communications Capability
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
30. Doodle Labs Announces Launch of Reseller Program
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.

31. Where To Buy - DJI
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
32. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 announcement assigns provisioning, billing and integration responsibilities, supporting a managed value-added channel mechanism without measured penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced delivery relationship concerns a dedicated satellite communications service; it supports a forecast premise, not realized 2032 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March 2026 collaboration names provisioning, billing, monitoring and lifecycle duties, supporting a provider-management commercial premise without disclosing penetration.
33. Statement: Spectrum for Unmanned Aircraft Systems - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An intermediary cannot independently grant network permission, limiting the forecast transfer of customer obligations.
34. DJI O4 Air Unit Series - FAQ
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.

35. Read Our Terms & Conditions - Elsight
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
36. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
37. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.

38. DJI Agriculture Reveals Global Adoption of Agricultural Drones Cuts 51Mt in Carbon Emissions and Saves 410Mts of Water for Farmers Globally
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
39. DJI Agriculture's Annual Report Reveals Drone-Powered Farming Revolution at Brazil's Agrishow 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
40. EHang Reports Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results - SEC Exhibit 99.1
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
41. Zipline to Triple U.S. Manufacturing Facility, Creating More Jobs in AI and Robotics
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
42. Swisscom Broadcast and Nokia Build Joint Drone Network Across Switzerland
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.

43. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
44. UAS Operator Radio Licence Guidance - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
45. Class Licences - Australian Communications and Media Authority
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
46. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.

47. Defence Procurement Agency DOT - Official Post on Fiber-Optic Drone Procurement and 2025 Deliveries
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
48. ITU-T Y.4215 - Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
49. IFRC Drones Group
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
50. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.

19.3. Russia

Table 405. Russia Drone Data Link System Market Size, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Russia	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 406. Russia Drone Data Link System Market Size, by Offering, 2017-2032 (USD Million)

Offering	2023	2024	2025	2026	2027	2032	CAGR (%)
Connectivity Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integration & Lifecycle Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Management & Transmission Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 407. Russia Drone Data Link System Market Size, by Data Link Hardware, 2017-2032 (USD Million)

Data Link Hardware	2023	2024	2025	2026	2027	2032	CAGR (%)
Complete Data Link Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Terminals & Modules	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Support Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 408. Russia Drone Data Link System Market Size, by Connectivity Technology, 2017-2032 (USD Million)

Connectivity Technology	2023	2024	2025	2026	2027	2032	CAGR (%)
Cellular Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Free-Space Optical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Multibearer Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Noncellular Radio Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Optical Fiber Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Satellite RF Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wired Electrical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 409. Russia Drone Data Link System Market Size, by Noncellular Radio Communications, 2017-2032 (USD Million)

Noncellular Radio Communications	2023	2024	2025	2026	2027	2032	CAGR (%)
Analog Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Analog & Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 410. Russia Drone Data Link System Market Size, by Network Topology, 2017-2032 (USD Million)

Network Topology	2023	2024	2025	2026	2027	2032	CAGR (%)
Centralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Decentralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Topologies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Point-to-Point Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 411. Russia Drone Data Link System Market Size, by Link Function, 2017-2032 (USD Million)

Link Function	2023	2024	2025	2026	2027	2032	CAGR (%)
Flight-Management Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Flight & Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mission Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 412. Russia Drone Data Link System Market Size, by Mission Application, 2017-2032 (USD Million)

Mission Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Agriculture & Forestry	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combat Operations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Communications Relay	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education, Training & Technology Development	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Inspection & Maintenance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intelligence, Surveillance & Reconnaissance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Media Production & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Sport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific Research & Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Search, Rescue & Emergency Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Surveying & Mapping	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transport & Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 413. Russia Drone Data Link System Market Size, by Transport & Logistics, 2017-2032 (USD Million)

Transport & Logistics	2023	2024	2025	2026	2027	2032	CAGR (%)
Cargo Transport & Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Uncrewed Passenger Transport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 414. Russia Drone Data Link System Market Size, by End User, 2017-2032 (USD Million)

End User	2023	2024	2025	2026	2027	2032	CAGR (%)
Civilian Government & Public Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Enterprises & Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Individual & Household Consumers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Military & Defense Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonprofit Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 415. Russia Drone Data Link System Market Size, by Deployment Model, 2017-2032 (USD Million)

Deployment Model	2023	2024	2025	2026	2027	2032	CAGR (%)
Customer-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Provider-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 416. Russia Drone Data Link System Market Size, by Sales Channel, 2017-2032 (USD Million)

Sales Channel	2023	2024	2025	2026	2027	2032	CAGR (%)
Distribution and Retail Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supplier-Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Value-Added Reseller and Integrator Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 417. Russia Drone Data Link System Market Size, by Operating Envelope, 2017-2032 (USD Million)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Beyond-Visual-Line-of-Sight Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visual-Line-of-Sight-Only Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 418. Russia Drone Data Link System Market Size, by Spectrum Access, 2017-2032 (USD Million)

Spectrum Access	2023	2024	2025	2026	2027	2032	CAGR (%)
Individually Licensed or Assigned Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
License-Exempt or Generally Authorized Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mixed Spectrum Authorization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
2. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
3. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.

4. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
5. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.

6. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
7. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.

8. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
9. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.

10. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
11. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

12. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.

13. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
- Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

14. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

15. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

16. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
17. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
18. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
19. Transformation of the Defence Forces: How Ukraine Changed Its System - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.

20. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
21. Safe-T Drone Power Station - Elistair
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
22. Safe-T 2 - Advanced Tethering System Brochure
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.

23. UAV/UGV Products - Advanced Microwave Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
24. Aquila20 FPV Kit - BETAFPV
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.

25. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
26. UAV Data Link and Unmanned Communications - DTC, a Codan Company
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.

27. Summary - ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
28. Mynaric AG - Annual Report 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
29. General Atomics and Kepler Communications Successfully Demonstrate Air-to-Space Optical Communications Capability
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
30. Doodle Labs Announces Launch of Reseller Program
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.

31. Where To Buy - DJI
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
32. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 announcement assigns provisioning, billing and integration responsibilities, supporting a managed value-added channel mechanism without measured penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced delivery relationship concerns a dedicated satellite communications service; it supports a forecast premise, not realized 2032 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March 2026 collaboration names provisioning, billing, monitoring and lifecycle duties, supporting a provider-management commercial premise without disclosing penetration.
33. Statement: Spectrum for Unmanned Aircraft Systems - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An intermediary cannot independently grant network permission, limiting the forecast transfer of customer obligations.
34. DJI O4 Air Unit Series - FAQ
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.

35. Read Our Terms & Conditions - Elsight
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
36. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
37. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.

38. DJI Agriculture Reveals Global Adoption of Agricultural Drones Cuts 51Mt in Carbon Emissions and Saves 410Mts of Water for Farmers Globally
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
39. DJI Agriculture's Annual Report Reveals Drone-Powered Farming Revolution at Brazil's Agrishow 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
40. EHang Reports Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results - SEC Exhibit 99.1
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
41. Zipline to Triple U.S. Manufacturing Facility, Creating More Jobs in AI and Robotics
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
42. Swisscom Broadcast and Nokia Build Joint Drone Network Across Switzerland
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.

43. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
44. UAS Operator Radio Licence Guidance - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
45. Class Licences - Australian Communications and Media Authority
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
46. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.

47. Defence Procurement Agency DOT - Official Post on Fiber-Optic Drone Procurement and 2025 Deliveries
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
48. ITU-T Y.4215 - Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
49. IFRC Drones Group
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
50. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.

19.4. United Kingdom

Table 419. United Kingdom Drone Data Link System Market Size, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 420. United Kingdom Drone Data Link System Market Size, by Offering, 2017-2032 (USD Million)

Offering	2023	2024	2025	2026	2027	2032	CAGR (%)
Connectivity Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integration & Lifecycle Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Management & Transmission Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 421. United Kingdom Drone Data Link System Market Size, by Data Link Hardware, 2017-2032 (USD Million)

Data Link Hardware	2023	2024	2025	2026	2027	2032	CAGR (%)
Complete Data Link Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Terminals & Modules	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Support Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 422. United Kingdom Drone Data Link System Market Size, by Connectivity Technology, 2017-2032 (USD Million)

Connectivity Technology	2023	2024	2025	2026	2027	2032	CAGR (%)
Cellular Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Free-Space Optical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Multibearer Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Noncellular Radio Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Optical Fiber Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Satellite RF Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wired Electrical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 423. United Kingdom Drone Data Link System Market Size, by Noncellular Radio Communications, 2017-2032 (USD Million)

Noncellular Radio Communications	2023	2024	2025	2026	2027	2032	CAGR (%)
Analog Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Analog & Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 424. United Kingdom Drone Data Link System Market Size, by Network Topology, 2017-2032 (USD Million)

Network Topology	2023	2024	2025	2026	2027	2032	CAGR (%)
Centralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Decentralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Topologies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Point-to-Point Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 425. United Kingdom Drone Data Link System Market Size, by Link Function, 2017-2032 (USD Million)

Link Function	2023	2024	2025	2026	2027	2032	CAGR (%)
Flight-Management Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Flight & Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mission Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 426. United Kingdom Drone Data Link System Market Size, by Mission Application, 2017-2032 (USD Million)

Mission Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Agriculture & Forestry	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combat Operations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Communications Relay	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education, Training & Technology Development	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Inspection & Maintenance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intelligence, Surveillance & Reconnaissance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Media Production & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Sport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific Research & Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Search, Rescue & Emergency Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Surveying & Mapping	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transport & Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 427. United Kingdom Drone Data Link System Market Size, by Transport & Logistics, 2017-2032 (USD Million)

Transport & Logistics	2023	2024	2025	2026	2027	2032	CAGR (%)
Cargo Transport & Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Uncrewed Passenger Transport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 428. United Kingdom Drone Data Link System Market Size, by End User, 2017-2032 (USD Million)

End User	2023	2024	2025	2026	2027	2032	CAGR (%)
Civilian Government & Public Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Enterprises & Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Individual & Household Consumers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Military & Defense Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonprofit Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 429. United Kingdom Drone Data Link System Market Size, by Deployment Model, 2017-2032 (USD Million)

Deployment Model	2023	2024	2025	2026	2027	2032	CAGR (%)
Customer-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Provider-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 430. United Kingdom Drone Data Link System Market Size, by Sales Channel, 2017-2032 (USD Million)

Sales Channel	2023	2024	2025	2026	2027	2032	CAGR (%)
Distribution and Retail Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supplier-Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Value-Added Reseller and Integrator Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 431. United Kingdom Drone Data Link System Market Size, by Operating Envelope, 2017-2032 (USD Million)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Beyond-Visual-Line-of-Sight Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visual-Line-of-Sight-Only Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 432. United Kingdom Drone Data Link System Market Size, by Spectrum Access, 2017-2032 (USD Million)

Spectrum Access	2023	2024	2025	2026	2027	2032	CAGR (%)
Individually Licensed or Assigned Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
License-Exempt or Generally Authorized Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mixed Spectrum Authorization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
2. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
3. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.

4. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
5. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.

6. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
7. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.

8. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
9. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.

10. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
11. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

12. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.

13. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
- Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

14. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

15. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

16. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
17. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
18. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
19. United Kingdom Main National Aviation Safety Plan 2026-2029 - CAP3237
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 baseline of xx.xx active operator IDs constrains the UK civilian pool; flyer IDs are not added as additional aircraft purchasers. ([caa.co.uk](https://www.caa.co.uk/publication/download/xx.xx))

20. Transformation of the Defence Forces: How Ukraine Changed Its System - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
21. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
22. Safe-T Drone Power Station - Elistair
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
23. Safe-T 2 - Advanced Tethering System Brochure
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.

24. UAV/UGV Products - Advanced Microwave Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
25. Aquila20 FPV Kit - BETAFPV
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.

26. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
27. UAV Data Link and Unmanned Communications - DTC, a Codan Company
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.

28. Summary - ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
29. Mynaric AG - Annual Report 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
30. General Atomics and Kepler Communications Successfully Demonstrate Air-to-Space Optical Communications Capability
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
31. Doodle Labs Announces Launch of Reseller Program
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.

32. Where To Buy - DJI
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
33. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 announcement assigns provisioning, billing and integration responsibilities, supporting a managed value-added channel mechanism without measured penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced delivery relationship concerns a dedicated satellite communications service; it supports a forecast premise, not realized 2032 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March 2026 collaboration names provisioning, billing, monitoring and lifecycle duties, supporting a provider-management commercial premise without disclosing penetration.
34. Statement: Spectrum for Unmanned Aircraft Systems - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An intermediary cannot independently grant network permission, limiting the forecast transfer of customer obligations.
35. DJI O4 Air Unit Series - FAQ
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.

36. Read Our Terms & Conditions - Elsight
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
37. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
38. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.

39. DJI Agriculture Reveals Global Adoption of Agricultural Drones Cuts 51Mt in Carbon Emissions and Saves 410Mts of Water for Farmers Globally
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
40. DJI Agriculture's Annual Report Reveals Drone-Powered Farming Revolution at Brazil's Agrishow 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
41. EHang Reports Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results - SEC Exhibit 99.1
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
42. Zipline to Triple U.S. Manufacturing Facility, Creating More Jobs in AI and Robotics
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
43. Swisscom Broadcast and Nokia Build Joint Drone Network Across Switzerland
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.

44. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
45. UAS Operator Radio Licence Guidance - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
46. Class Licences - Australian Communications and Media Authority
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
47. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.

48. Defence Procurement Agency DOT - Official Post on Fiber-Optic Drone Procurement and 2025 Deliveries
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
49. ITU-T Y.4215 - Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
50. IFRC Drones Group
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
51. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.

19.5. Germany

Table 433. Germany Drone Data Link System Market Size, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Germany	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 434. Germany Drone Data Link System Market Size, by Offering, 2017-2032 (USD Million)

Offering	2023	2024	2025	2026	2027	2032	CAGR (%)
Connectivity Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integration & Lifecycle Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Management & Transmission Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 435. Germany Drone Data Link System Market Size, by Data Link Hardware, 2017-2032 (USD Million)

Data Link Hardware	2023	2024	2025	2026	2027	2032	CAGR (%)
Complete Data Link Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Terminals & Modules	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Support Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 436. Germany Drone Data Link System Market Size, by Connectivity Technology, 2017-2032 (USD Million)

Connectivity Technology	2023	2024	2025	2026	2027	2032	CAGR (%)
Cellular Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Free-Space Optical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Multibearer Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Noncellular Radio Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Optical Fiber Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Satellite RF Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wired Electrical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 437. Germany Drone Data Link System Market Size, by Noncellular Radio Communications, 2017-2032 (USD Million)

Noncellular Radio Communications	2023	2024	2025	2026	2027	2032	CAGR (%)
Analog Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Analog & Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 438. Germany Drone Data Link System Market Size, by Network Topology, 2017-2032 (USD Million)

Network Topology	2023	2024	2025	2026	2027	2032	CAGR (%)
Centralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Decentralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Topologies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Point-to-Point Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 439. Germany Drone Data Link System Market Size, by Link Function, 2017-2032 (USD Million)

Link Function	2023	2024	2025	2026	2027	2032	CAGR (%)
Flight-Management Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Flight & Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mission Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 440. Germany Drone Data Link System Market Size, by Mission Application, 2017-2032 (USD Million)

Mission Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Agriculture & Forestry	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combat Operations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Communications Relay	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education, Training & Technology Development	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Inspection & Maintenance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intelligence, Surveillance & Reconnaissance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Media Production & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Sport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific Research & Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Search, Rescue & Emergency Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Surveying & Mapping	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transport & Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 441. Germany Drone Data Link System Market Size, by Transport & Logistics, 2017-2032 (USD Million)

Transport & Logistics	2023	2024	2025	2026	2027	2032	CAGR (%)
Cargo Transport & Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Uncrewed Passenger Transport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 442. Germany Drone Data Link System Market Size, by End User, 2017-2032 (USD Million)

End User	2023	2024	2025	2026	2027	2032	CAGR (%)
Civilian Government & Public Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Enterprises & Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Individual & Household Consumers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Military & Defense Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonprofit Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 443. Germany Drone Data Link System Market Size, by Deployment Model, 2017-2032 (USD Million)

Deployment Model	2023	2024	2025	2026	2027	2032	CAGR (%)
Customer-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Provider-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 444. Germany Drone Data Link System Market Size, by Sales Channel, 2017-2032 (USD Million)

Sales Channel	2023	2024	2025	2026	2027	2032	CAGR (%)
Distribution and Retail Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supplier-Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Value-Added Reseller and Integrator Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 445. Germany Drone Data Link System Market Size, by Operating Envelope, 2017-2032 (USD Million)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Beyond-Visual-Line-of-Sight Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visual-Line-of-Sight-Only Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 446. Germany Drone Data Link System Market Size, by Spectrum Access, 2017-2032 (USD Million)

Spectrum Access	2023	2024	2025	2026	2027	2032	CAGR (%)
Individually Licensed or Assigned Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
License-Exempt or Generally Authorized Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mixed Spectrum Authorization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
2. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
3. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.

4. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
5. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.

6. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
7. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.

8. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
9. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.

10. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
11. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

12. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.

13. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
- Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

14. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

15. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

16. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
17. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
18. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
19. Transformation of the Defence Forces: How Ukraine Changed Its System - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.

20. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
21. Safe-T Drone Power Station - Elistair
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
22. Safe-T 2 - Advanced Tethering System Brochure
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.

23. UAV/UGV Products - Advanced Microwave Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
24. Aquila20 FPV Kit - BETAFPV
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.

25. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
26. UAV Data Link and Unmanned Communications - DTC, a Codan Company
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.

27. Summary - ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
28. Mynaric AG - Annual Report 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
29. General Atomics and Kepler Communications Successfully Demonstrate Air-to-Space Optical Communications Capability
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
30. Doodle Labs Announces Launch of Reseller Program
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.

31. Where To Buy - DJI
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
32. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 announcement assigns provisioning, billing and integration responsibilities, supporting a managed value-added channel mechanism without measured penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced delivery relationship concerns a dedicated satellite communications service; it supports a forecast premise, not realized 2032 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March 2026 collaboration names provisioning, billing, monitoring and lifecycle duties, supporting a provider-management commercial premise without disclosing penetration.
33. Statement: Spectrum for Unmanned Aircraft Systems - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An intermediary cannot independently grant network permission, limiting the forecast transfer of customer obligations.
34. DJI O4 Air Unit Series - FAQ
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.

35. Read Our Terms & Conditions - Elsight
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
36. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
37. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.

38. DJI Agriculture Reveals Global Adoption of Agricultural Drones Cuts 51Mt in Carbon Emissions and Saves 410Mts of Water for Farmers Globally
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
39. DJI Agriculture's Annual Report Reveals Drone-Powered Farming Revolution at Brazil's Agrishow 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
40. EHang Reports Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results - SEC Exhibit 99.1
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
41. Zipline to Triple U.S. Manufacturing Facility, Creating More Jobs in AI and Robotics
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
42. Swisscom Broadcast and Nokia Build Joint Drone Network Across Switzerland
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.

43. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
44. UAS Operator Radio Licence Guidance - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
45. Class Licences - Australian Communications and Media Authority
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
46. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.

47. Defence Procurement Agency DOT - Official Post on Fiber-Optic Drone Procurement and 2025 Deliveries
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
48. ITU-T Y.4215 - Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
49. IFRC Drones Group
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
50. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.

19.6. France

Table 447. France Drone Data Link System Market Size, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
France	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 448. France Drone Data Link System Market Size, by Offering, 2017-2032 (USD Million)

Offering	2023	2024	2025	2026	2027	2032	CAGR (%)
Connectivity Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integration & Lifecycle Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Management & Transmission Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 449. France Drone Data Link System Market Size, by Data Link Hardware, 2017-2032 (USD Million)

Data Link Hardware	2023	2024	2025	2026	2027	2032	CAGR (%)
Complete Data Link Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Terminals & Modules	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Support Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 450. France Drone Data Link System Market Size, by Connectivity Technology, 2017-2032 (USD Million)

Connectivity Technology	2023	2024	2025	2026	2027	2032	CAGR (%)
Cellular Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Free-Space Optical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Multibearer Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Noncellular Radio Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Optical Fiber Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Satellite RF Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wired Electrical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 451. France Drone Data Link System Market Size, by Noncellular Radio Communications, 2017-2032 (USD Million)

Noncellular Radio Communications	2023	2024	2025	2026	2027	2032	CAGR (%)
Analog Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Analog & Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 452. France Drone Data Link System Market Size, by Network Topology, 2017-2032 (USD Million)

Network Topology	2023	2024	2025	2026	2027	2032	CAGR (%)
Centralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Decentralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Topologies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Point-to-Point Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 453. France Drone Data Link System Market Size, by Link Function, 2017-2032 (USD Million)

Link Function	2023	2024	2025	2026	2027	2032	CAGR (%)
Flight-Management Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Flight & Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mission Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 454. France Drone Data Link System Market Size, by Mission Application, 2017-2032 (USD Million)

Mission Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Agriculture & Forestry	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combat Operations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Communications Relay	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education, Training & Technology Development	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Inspection & Maintenance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intelligence, Surveillance & Reconnaissance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Media Production & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Sport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific Research & Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Search, Rescue & Emergency Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Surveying & Mapping	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transport & Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 455. France Drone Data Link System Market Size, by Transport & Logistics, 2017-2032 (USD Million)

Transport & Logistics	2023	2024	2025	2026	2027	2032	CAGR (%)
Cargo Transport & Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Uncrewed Passenger Transport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 456. France Drone Data Link System Market Size, by End User, 2017-2032 (USD Million)

End User	2023	2024	2025	2026	2027	2032	CAGR (%)
Civilian Government & Public Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Enterprises & Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Individual & Household Consumers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Military & Defense Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonprofit Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 457. France Drone Data Link System Market Size, by Deployment Model, 2017-2032 (USD Million)

Deployment Model	2023	2024	2025	2026	2027	2032	CAGR (%)
Customer-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Provider-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 458. France Drone Data Link System Market Size, by Sales Channel, 2017-2032 (USD Million)

Sales Channel	2023	2024	2025	2026	2027	2032	CAGR (%)
Distribution and Retail Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supplier-Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Value-Added Reseller and Integrator Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 459. France Drone Data Link System Market Size, by Operating Envelope, 2017-2032 (USD Million)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Beyond-Visual-Line-of-Sight Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visual-Line-of-Sight-Only Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 460. France Drone Data Link System Market Size, by Spectrum Access, 2017-2032 (USD Million)

Spectrum Access	2023	2024	2025	2026	2027	2032	CAGR (%)
Individually Licensed or Assigned Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
License-Exempt or Generally Authorized Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mixed Spectrum Authorization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
2. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
3. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.

4. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
5. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.

6. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
7. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.

8. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
9. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.

10. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
11. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

12. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.

13. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
- Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

14. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

15. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

16. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
17. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
18. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
19. Transformation of the Defence Forces: How Ukraine Changed Its System - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.

20. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.

21. Safe-T Drone Power Station - Elistair
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.

22. Safe-T 2 - Advanced Tethering System Brochure
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.

23. UAV/UGV Products - Advanced Microwave Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
24. Aquila20 FPV Kit - BETAFPV
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.

25. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
26. UAV Data Link and Unmanned Communications - DTC, a Codan Company
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.

27. Summary - ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
28. Mynaric AG - Annual Report 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
29. General Atomics and Kepler Communications Successfully Demonstrate Air-to-Space Optical Communications Capability
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
30. Doodle Labs Announces Launch of Reseller Program
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.

31. Where To Buy - DJI
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
32. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 announcement assigns provisioning, billing and integration responsibilities, supporting a managed value-added channel mechanism without measured penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced delivery relationship concerns a dedicated satellite communications service; it supports a forecast premise, not realized 2032 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March 2026 collaboration names provisioning, billing, monitoring and lifecycle duties, supporting a provider-management commercial premise without disclosing penetration.
33. Statement: Spectrum for Unmanned Aircraft Systems - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An intermediary cannot independently grant network permission, limiting the forecast transfer of customer obligations.
34. DJI O4 Air Unit Series - FAQ
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.

35. Read Our Terms & Conditions - Elsight
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
36. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
37. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.

38. DJI Agriculture Reveals Global Adoption of Agricultural Drones Cuts 51Mt in Carbon Emissions and Saves 410Mts of Water for Farmers Globally
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
39. DJI Agriculture's Annual Report Reveals Drone-Powered Farming Revolution at Brazil's Agrishow 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
40. EHang Reports Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results - SEC Exhibit 99.1
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
41. Zipline to Triple U.S. Manufacturing Facility, Creating More Jobs in AI and Robotics
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
42. Swisscom Broadcast and Nokia Build Joint Drone Network Across Switzerland
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.

43. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
44. UAS Operator Radio Licence Guidance - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
45. Class Licences - Australian Communications and Media Authority
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
46. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.

47. Defence Procurement Agency DOT - Official Post on Fiber-Optic Drone Procurement and 2025 Deliveries
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
48. ITU-T Y.4215 - Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
49. IFRC Drones Group
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
50. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.

19.7. India

Table 461. India Drone Data Link System Market Size, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
India	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 462. India Drone Data Link System Market Size, by Offering, 2017-2032 (USD Million)

Offering	2023	2024	2025	2026	2027	2032	CAGR (%)
Connectivity Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integration & Lifecycle Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Management & Transmission Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 463. India Drone Data Link System Market Size, by Data Link Hardware, 2017-2032 (USD Million)

Data Link Hardware	2023	2024	2025	2026	2027	2032	CAGR (%)
Complete Data Link Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Terminals & Modules	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Support Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 464. India Drone Data Link System Market Size, by Connectivity Technology, 2017-2032 (USD Million)

Connectivity Technology	2023	2024	2025	2026	2027	2032	CAGR (%)
Cellular Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Free-Space Optical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Multibearer Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Noncellular Radio Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Optical Fiber Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Satellite RF Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wired Electrical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 465. India Drone Data Link System Market Size, by Noncellular Radio Communications, 2017-2032 (USD Million)

Noncellular Radio Communications	2023	2024	2025	2026	2027	2032	CAGR (%)
Analog Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Analog & Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 466. India Drone Data Link System Market Size, by Network Topology, 2017-2032 (USD Million)

Network Topology	2023	2024	2025	2026	2027	2032	CAGR (%)
Centralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Decentralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Topologies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Point-to-Point Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 467. India Drone Data Link System Market Size, by Link Function, 2017-2032 (USD Million)

Link Function	2023	2024	2025	2026	2027	2032	CAGR (%)
Flight-Management Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Flight & Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mission Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 468. India Drone Data Link System Market Size, by Mission Application, 2017-2032 (USD Million)

Mission Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Agriculture & Forestry	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combat Operations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Communications Relay	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education, Training & Technology Development	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Inspection & Maintenance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intelligence, Surveillance & Reconnaissance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Media Production & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Sport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific Research & Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Search, Rescue & Emergency Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Surveying & Mapping	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transport & Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 469. India Drone Data Link System Market Size, by Transport & Logistics, 2017-2032 (USD Million)

Transport & Logistics	2023	2024	2025	2026	2027	2032	CAGR (%)
Cargo Transport & Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Uncrewed Passenger Transport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 470. India Drone Data Link System Market Size, by End User, 2017-2032 (USD Million)

End User	2023	2024	2025	2026	2027	2032	CAGR (%)
Civilian Government & Public Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Enterprises & Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Individual & Household Consumers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Military & Defense Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonprofit Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 471. India Drone Data Link System Market Size, by Deployment Model, 2017-2032 (USD Million)

Deployment Model	2023	2024	2025	2026	2027	2032	CAGR (%)
Customer-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Provider-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 472. India Drone Data Link System Market Size, by Sales Channel, 2017-2032 (USD Million)

Sales Channel	2023	2024	2025	2026	2027	2032	CAGR (%)
Distribution and Retail Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supplier-Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Value-Added Reseller and Integrator Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 473. India Drone Data Link System Market Size, by Operating Envelope, 2017-2032 (USD Million)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Beyond-Visual-Line-of-Sight Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visual-Line-of-Sight-Only Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 474. India Drone Data Link System Market Size, by Spectrum Access, 2017-2032 (USD Million)

Spectrum Access	2023	2024	2025	2026	2027	2032	CAGR (%)
Individually Licensed or Assigned Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
License-Exempt or Generally Authorized Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mixed Spectrum Authorization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
2. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
3. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.

4. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
5. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.

6. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
7. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.

8. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
9. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.

10. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
11. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

12. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.

13. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
- Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

14. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

15. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

16. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
17. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
18. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
19. India’s Drone Ecosystem: From Policy to Public Service Transformation - Press Information Bureau, February 17, 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 figure of xx.xx registered drones and documented public purchasing channels constrain the bridged 2025 pool; future equipment and service adoption are modeled. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx&trk=article-ssr-frontend-pulse_little-text-block))

20. Transformation of the Defence Forces: How Ukraine Changed Its System - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
21. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
22. Safe-T Drone Power Station - Elistair
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
23. Safe-T 2 - Advanced Tethering System Brochure
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.

24. UAV/UGV Products - Advanced Microwave Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
25. Aquila20 FPV Kit - BETAFPV
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.

26. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
27. UAV Data Link and Unmanned Communications - DTC, a Codan Company
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.

28. Summary - ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
29. Mynaric AG - Annual Report 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
30. General Atomics and Kepler Communications Successfully Demonstrate Air-to-Space Optical Communications Capability
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
31. Doodle Labs Announces Launch of Reseller Program
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.

32. Where To Buy - DJI
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
33. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 announcement assigns provisioning, billing and integration responsibilities, supporting a managed value-added channel mechanism without measured penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced delivery relationship concerns a dedicated satellite communications service; it supports a forecast premise, not realized 2032 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March 2026 collaboration names provisioning, billing, monitoring and lifecycle duties, supporting a provider-management commercial premise without disclosing penetration.
34. Statement: Spectrum for Unmanned Aircraft Systems - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An intermediary cannot independently grant network permission, limiting the forecast transfer of customer obligations.
35. DJI O4 Air Unit Series - FAQ
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.

36. Read Our Terms & Conditions - Elsight
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
37. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
38. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.

39. DJI Agriculture Reveals Global Adoption of Agricultural Drones Cuts 51Mt in Carbon Emissions and Saves 410Mts of Water for Farmers Globally
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
40. DJI Agriculture's Annual Report Reveals Drone-Powered Farming Revolution at Brazil's Agrishow 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
41. EHang Reports Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results - SEC Exhibit 99.1
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
42. Zipline to Triple U.S. Manufacturing Facility, Creating More Jobs in AI and Robotics
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
43. Swisscom Broadcast and Nokia Build Joint Drone Network Across Switzerland
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.

44. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
45. UAS Operator Radio Licence Guidance - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
46. Class Licences - Australian Communications and Media Authority
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
47. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.

48. Defence Procurement Agency DOT - Official Post on Fiber-Optic Drone Procurement and 2025 Deliveries
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
49. ITU-T Y.4215 - Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
50. IFRC Drones Group
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
51. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.

19.8. Japan

Table 475. Japan Drone Data Link System Market Size, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Japan	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 476. Japan Drone Data Link System Market Size, by Offering, 2017-2032 (USD Million)

Offering	2023	2024	2025	2026	2027	2032	CAGR (%)
Connectivity Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integration & Lifecycle Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Management & Transmission Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 477. Japan Drone Data Link System Market Size, by Data Link Hardware, 2017-2032 (USD Million)

Data Link Hardware	2023	2024	2025	2026	2027	2032	CAGR (%)
Complete Data Link Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Terminals & Modules	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Support Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 478. Japan Drone Data Link System Market Size, by Connectivity Technology, 2017-2032 (USD Million)

Connectivity Technology	2023	2024	2025	2026	2027	2032	CAGR (%)
Cellular Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Free-Space Optical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Multibearer Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Noncellular Radio Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Optical Fiber Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Satellite RF Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wired Electrical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 479. Japan Drone Data Link System Market Size, by Noncellular Radio Communications, 2017-2032 (USD Million)

Noncellular Radio Communications	2023	2024	2025	2026	2027	2032	CAGR (%)
Analog Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Analog & Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 480. Japan Drone Data Link System Market Size, by Network Topology, 2017-2032 (USD Million)

Network Topology	2023	2024	2025	2026	2027	2032	CAGR (%)
Centralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Decentralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Topologies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Point-to-Point Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 481. Japan Drone Data Link System Market Size, by Link Function, 2017-2032 (USD Million)

Link Function	2023	2024	2025	2026	2027	2032	CAGR (%)
Flight-Management Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Flight & Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mission Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 482. Japan Drone Data Link System Market Size, by Mission Application, 2017-2032 (USD Million)

Mission Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Agriculture & Forestry	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combat Operations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Communications Relay	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education, Training & Technology Development	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Inspection & Maintenance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intelligence, Surveillance & Reconnaissance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Media Production & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Sport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific Research & Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Search, Rescue & Emergency Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Surveying & Mapping	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transport & Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 483. Japan Drone Data Link System Market Size, by Transport & Logistics, 2017-2032 (USD Million)

Transport & Logistics	2023	2024	2025	2026	2027	2032	CAGR (%)
Cargo Transport & Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Uncrewed Passenger Transport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 484. Japan Drone Data Link System Market Size, by End User, 2017-2032 (USD Million)

End User	2023	2024	2025	2026	2027	2032	CAGR (%)
Civilian Government & Public Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Enterprises & Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Individual & Household Consumers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Military & Defense Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonprofit Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 485. Japan Drone Data Link System Market Size, by Deployment Model, 2017-2032 (USD Million)

Deployment Model	2023	2024	2025	2026	2027	2032	CAGR (%)
Customer-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Provider-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 486. Japan Drone Data Link System Market Size, by Sales Channel, 2017-2032 (USD Million)

Sales Channel	2023	2024	2025	2026	2027	2032	CAGR (%)
Distribution and Retail Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supplier-Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Value-Added Reseller and Integrator Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 487. Japan Drone Data Link System Market Size, by Operating Envelope, 2017-2032 (USD Million)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Beyond-Visual-Line-of-Sight Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visual-Line-of-Sight-Only Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 488. Japan Drone Data Link System Market Size, by Spectrum Access, 2017-2032 (USD Million)

Spectrum Access	2023	2024	2025	2026	2027	2032	CAGR (%)
Individually Licensed or Assigned Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
License-Exempt or Generally Authorized Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mixed Spectrum Authorization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
2. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
3. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.

4. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
5. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.

6. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
7. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.

8. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
9. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.

10. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
11. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

12. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.

13. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
- Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

14. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

15. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

16. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
17. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
18. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
19. Transformation of the Defence Forces: How Ukraine Changed Its System - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.

20. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
21. Safe-T Drone Power Station - Elistair
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
22. Safe-T 2 - Advanced Tethering System Brochure
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.

23. UAV/UGV Products - Advanced Microwave Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
24. Aquila20 FPV Kit - BETAFPV
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.

25. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
26. UAV Data Link and Unmanned Communications - DTC, a Codan Company
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.

27. Summary - ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
28. Mynaric AG - Annual Report 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
29. General Atomics and Kepler Communications Successfully Demonstrate Air-to-Space Optical Communications Capability
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
30. Doodle Labs Announces Launch of Reseller Program
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.

31. Where To Buy - DJI
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
32. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 announcement assigns provisioning, billing and integration responsibilities, supporting a managed value-added channel mechanism without measured penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced delivery relationship concerns a dedicated satellite communications service; it supports a forecast premise, not realized 2032 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March 2026 collaboration names provisioning, billing, monitoring and lifecycle duties, supporting a provider-management commercial premise without disclosing penetration.
33. Statement: Spectrum for Unmanned Aircraft Systems - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An intermediary cannot independently grant network permission, limiting the forecast transfer of customer obligations.
34. DJI O4 Air Unit Series - FAQ
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.

35. Read Our Terms & Conditions - Elsight
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
36. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
37. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.

38. DJI Agriculture Reveals Global Adoption of Agricultural Drones Cuts 51Mt in Carbon Emissions and Saves 410Mts of Water for Farmers Globally
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
39. DJI Agriculture's Annual Report Reveals Drone-Powered Farming Revolution at Brazil's Agrishow 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
40. EHang Reports Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results - SEC Exhibit 99.1
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
41. Zipline to Triple U.S. Manufacturing Facility, Creating More Jobs in AI and Robotics
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
42. Swisscom Broadcast and Nokia Build Joint Drone Network Across Switzerland
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.

43. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
44. UAS Operator Radio Licence Guidance - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
45. Class Licences - Australian Communications and Media Authority
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
46. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.

47. Defence Procurement Agency DOT - Official Post on Fiber-Optic Drone Procurement and 2025 Deliveries
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
48. ITU-T Y.4215 - Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
49. IFRC Drones Group
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
50. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.

19.9. Australia

Table 489. Australia Drone Data Link System Market Size, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 490. Australia Drone Data Link System Market Size, by Offering, 2017-2032 (USD Million)

Offering	2023	2024	2025	2026	2027	2032	CAGR (%)
Connectivity Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integration & Lifecycle Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Management & Transmission Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 491. Australia Drone Data Link System Market Size, by Data Link Hardware, 2017-2032 (USD Million)

Data Link Hardware	2023	2024	2025	2026	2027	2032	CAGR (%)
Complete Data Link Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Terminals & Modules	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Support Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 492. Australia Drone Data Link System Market Size, by Connectivity Technology, 2017-2032 (USD Million)

Connectivity Technology	2023	2024	2025	2026	2027	2032	CAGR (%)
Cellular Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Free-Space Optical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Multibearer Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Noncellular Radio Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Optical Fiber Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Satellite RF Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wired Electrical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 493. Australia Drone Data Link System Market Size, by Noncellular Radio Communications, 2017-2032 (USD Million)

Noncellular Radio Communications	2023	2024	2025	2026	2027	2032	CAGR (%)
Analog Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Analog & Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 494. Australia Drone Data Link System Market Size, by Network Topology, 2017-2032 (USD Million)

Network Topology	2023	2024	2025	2026	2027	2032	CAGR (%)
Centralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Decentralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Topologies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Point-to-Point Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 495. Australia Drone Data Link System Market Size, by Link Function, 2017-2032 (USD Million)

Link Function	2023	2024	2025	2026	2027	2032	CAGR (%)
Flight-Management Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Flight & Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mission Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 496. Australia Drone Data Link System Market Size, by Mission Application, 2017-2032 (USD Million)

Mission Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Agriculture & Forestry	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combat Operations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Communications Relay	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education, Training & Technology Development	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Inspection & Maintenance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intelligence, Surveillance & Reconnaissance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Media Production & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Sport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific Research & Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Search, Rescue & Emergency Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Surveying & Mapping	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transport & Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 497. Australia Drone Data Link System Market Size, by Transport & Logistics, 2017-2032 (USD Million)

Transport & Logistics	2023	2024	2025	2026	2027	2032	CAGR (%)
Cargo Transport & Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Uncrewed Passenger Transport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 498. Australia Drone Data Link System Market Size, by End User, 2017-2032 (USD Million)

End User	2023	2024	2025	2026	2027	2032	CAGR (%)
Civilian Government & Public Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Enterprises & Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Individual & Household Consumers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Military & Defense Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonprofit Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 499. Australia Drone Data Link System Market Size, by Deployment Model, 2017-2032 (USD Million)

Deployment Model	2023	2024	2025	2026	2027	2032	CAGR (%)
Customer-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Provider-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 500. Australia Drone Data Link System Market Size, by Sales Channel, 2017-2032 (USD Million)

Sales Channel	2023	2024	2025	2026	2027	2032	CAGR (%)
Distribution and Retail Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supplier-Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Value-Added Reseller and Integrator Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 501. Australia Drone Data Link System Market Size, by Operating Envelope, 2017-2032 (USD Million)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Beyond-Visual-Line-of-Sight Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visual-Line-of-Sight-Only Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 502. Australia Drone Data Link System Market Size, by Spectrum Access, 2017-2032 (USD Million)

Spectrum Access	2023	2024	2025	2026	2027	2032	CAGR (%)
Individually Licensed or Assigned Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
License-Exempt or Generally Authorized Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mixed Spectrum Authorization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
2. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
3. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.

4. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
5. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.

6. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
7. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.

8. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
9. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.

10. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
11. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

12. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
13. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
    - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.
14. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.
15. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
    - Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

16. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
17. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
18. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
19. Civil Aviation Safety Authority Annual Report 2024-25
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: June 2025 active-drone, operator-certificate and remote-pilot observations calibrate Australia's professional equipment/service mix, not annual shipment totals. ([casa.gov.au](https://www.casa.gov.au/sites/default/files/2025-xx.xx/casa-annual-report-2024-2025.pdf))

20. Transformation of the Defence Forces: How Ukraine Changed Its System - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
21. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
22. Safe-T Drone Power Station - Elistair
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
23. Safe-T 2 - Advanced Tethering System Brochure
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.

24. UAV/UGV Products - Advanced Microwave Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
25. Aquila20 FPV Kit - BETAFPV
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.

26. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
27. UAV Data Link and Unmanned Communications - DTC, a Codan Company
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.

28. Summary - ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
29. Mynaric AG - Annual Report 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
30. General Atomics and Kepler Communications Successfully Demonstrate Air-to-Space Optical Communications Capability
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
31. Doodle Labs Announces Launch of Reseller Program
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.

32. Where To Buy - DJI
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
33. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 announcement assigns provisioning, billing and integration responsibilities, supporting a managed value-added channel mechanism without measured penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced delivery relationship concerns a dedicated satellite communications service; it supports a forecast premise, not realized 2032 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March 2026 collaboration names provisioning, billing, monitoring and lifecycle duties, supporting a provider-management commercial premise without disclosing penetration.
34. Statement: Spectrum for Unmanned Aircraft Systems - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An intermediary cannot independently grant network permission, limiting the forecast transfer of customer obligations.
35. DJI O4 Air Unit Series - FAQ
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.

36. Read Our Terms & Conditions - Elsight
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
37. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
38. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.

39. DJI Agriculture Reveals Global Adoption of Agricultural Drones Cuts 51Mt in Carbon Emissions and Saves 410Mts of Water for Farmers Globally
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
40. DJI Agriculture's Annual Report Reveals Drone-Powered Farming Revolution at Brazil's Agrishow 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
41. EHang Reports Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results - SEC Exhibit 99.1
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
42. Zipline to Triple U.S. Manufacturing Facility, Creating More Jobs in AI and Robotics
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
43. Swisscom Broadcast and Nokia Build Joint Drone Network Across Switzerland
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.

44. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
45. UAS Operator Radio Licence Guidance - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
46. Class Licences - Australian Communications and Media Authority
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
47. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.

48. Defence Procurement Agency DOT - Official Post on Fiber-Optic Drone Procurement and 2025 Deliveries
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
49. ITU-T Y.4215 - Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
50. IFRC Drones Group
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
51. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.

19.10. Brazil

Table 503. Brazil Drone Data Link System Market Size, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 504. Brazil Drone Data Link System Market Size, by Offering, 2017-2032 (USD Million)

Offering	2023	2024	2025	2026	2027	2032	CAGR (%)
Connectivity Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integration & Lifecycle Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Management & Transmission Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 505. Brazil Drone Data Link System Market Size, by Data Link Hardware, 2017-2032 (USD Million)

Data Link Hardware	2023	2024	2025	2026	2027	2032	CAGR (%)
Complete Data Link Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Terminals & Modules	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Support Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 506. Brazil Drone Data Link System Market Size, by Connectivity Technology, 2017-2032 (USD Million)

Connectivity Technology	2023	2024	2025	2026	2027	2032	CAGR (%)
Cellular Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Free-Space Optical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Multibearer Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Noncellular Radio Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Optical Fiber Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Satellite RF Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wired Electrical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 507. Brazil Drone Data Link System Market Size, by Noncellular Radio Communications, 2017-2032 (USD Million)

Noncellular Radio Communications	2023	2024	2025	2026	2027	2032	CAGR (%)
Analog Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Analog & Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 508. Brazil Drone Data Link System Market Size, by Network Topology, 2017-2032 (USD Million)

Network Topology	2023	2024	2025	2026	2027	2032	CAGR (%)
Centralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Decentralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Topologies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Point-to-Point Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 509. Brazil Drone Data Link System Market Size, by Link Function, 2017-2032 (USD Million)

Link Function	2023	2024	2025	2026	2027	2032	CAGR (%)
Flight-Management Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Flight & Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mission Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 510. Brazil Drone Data Link System Market Size, by Mission Application, 2017-2032 (USD Million)

Mission Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Agriculture & Forestry	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combat Operations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Communications Relay	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education, Training & Technology Development	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Inspection & Maintenance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intelligence, Surveillance & Reconnaissance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Media Production & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Sport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific Research & Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Search, Rescue & Emergency Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Surveying & Mapping	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transport & Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 511. Brazil Drone Data Link System Market Size, by Transport & Logistics, 2017-2032 (USD Million)

Transport & Logistics	2023	2024	2025	2026	2027	2032	CAGR (%)
Cargo Transport & Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Uncrewed Passenger Transport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 512. Brazil Drone Data Link System Market Size, by End User, 2017-2032 (USD Million)

End User	2023	2024	2025	2026	2027	2032	CAGR (%)
Civilian Government & Public Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Enterprises & Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Individual & Household Consumers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Military & Defense Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonprofit Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 513. Brazil Drone Data Link System Market Size, by Deployment Model, 2017-2032 (USD Million)

Deployment Model	2023	2024	2025	2026	2027	2032	CAGR (%)
Customer-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Provider-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 514. Brazil Drone Data Link System Market Size, by Sales Channel, 2017-2032 (USD Million)

Sales Channel	2023	2024	2025	2026	2027	2032	CAGR (%)
Distribution and Retail Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supplier-Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Value-Added Reseller and Integrator Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 515. Brazil Drone Data Link System Market Size, by Operating Envelope, 2017-2032 (USD Million)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Beyond-Visual-Line-of-Sight Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visual-Line-of-Sight-Only Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 516. Brazil Drone Data Link System Market Size, by Spectrum Access, 2017-2032 (USD Million)

Spectrum Access	2023	2024	2025	2026	2027	2032	CAGR (%)
Individually Licensed or Assigned Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
License-Exempt or Generally Authorized Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mixed Spectrum Authorization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
2. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
3. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.

4. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
5. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.

6. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
7. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.

8. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
9. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.

10. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
11. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

12. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.

13. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
- Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

14. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

15. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

16. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
17. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
18. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
19. Declaração de Conformidade para Uso Próprio - Anatel
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Own-use conformity excludes commercialization, qualifying resale and integration-channel assumptions without establishing sales volumes. ([gov.br](https://www.gov.br/anatel/pt-br/regulado/certificacao-de-produtos/declaracao-de-conformidade))

20. Transformation of the Defence Forces: How Ukraine Changed Its System - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
21. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
22. Safe-T Drone Power Station - Elistair
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
23. Safe-T 2 - Advanced Tethering System Brochure
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.

24. UAV/UGV Products - Advanced Microwave Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
25. Aquila20 FPV Kit - BETAFPV
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.

26. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
27. UAV Data Link and Unmanned Communications - DTC, a Codan Company
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.

28. Summary - ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
29. Mynaric AG - Annual Report 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
30. General Atomics and Kepler Communications Successfully Demonstrate Air-to-Space Optical Communications Capability
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
31. Doodle Labs Announces Launch of Reseller Program
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.

32. Where To Buy - DJI
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
33. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 announcement assigns provisioning, billing and integration responsibilities, supporting a managed value-added channel mechanism without measured penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced delivery relationship concerns a dedicated satellite communications service; it supports a forecast premise, not realized 2032 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March 2026 collaboration names provisioning, billing, monitoring and lifecycle duties, supporting a provider-management commercial premise without disclosing penetration.
34. Statement: Spectrum for Unmanned Aircraft Systems - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An intermediary cannot independently grant network permission, limiting the forecast transfer of customer obligations.
35. DJI O4 Air Unit Series - FAQ
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.

36. Read Our Terms & Conditions - Elsight
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
37. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
38. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.

39. DJI Agriculture Reveals Global Adoption of Agricultural Drones Cuts 51Mt in Carbon Emissions and Saves 410Mts of Water for Farmers Globally
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
40. DJI Agriculture's Annual Report Reveals Drone-Powered Farming Revolution at Brazil's Agrishow 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
41. EHang Reports Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results - SEC Exhibit 99.1
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
42. Zipline to Triple U.S. Manufacturing Facility, Creating More Jobs in AI and Robotics
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
43. Swisscom Broadcast and Nokia Build Joint Drone Network Across Switzerland
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.

44. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
45. UAS Operator Radio Licence Guidance - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
46. Class Licences - Australian Communications and Media Authority
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
47. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.

48. Defence Procurement Agency DOT - Official Post on Fiber-Optic Drone Procurement and 2025 Deliveries
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
49. ITU-T Y.4215 - Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
50. IFRC Drones Group
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
51. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.

19.11. South Korea

Table 517. South Korea Drone Data Link System Market Size, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 518. South Korea Drone Data Link System Market Size, by Offering, 2017-2032 (USD Million)

Offering	2023	2024	2025	2026	2027	2032	CAGR (%)
Connectivity Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integration & Lifecycle Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Management & Transmission Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 519. South Korea Drone Data Link System Market Size, by Data Link Hardware, 2017-2032 (USD Million)

Data Link Hardware	2023	2024	2025	2026	2027	2032	CAGR (%)
Complete Data Link Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Terminals & Modules	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Support Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 520. South Korea Drone Data Link System Market Size, by Connectivity Technology, 2017-2032 (USD Million)

Connectivity Technology	2023	2024	2025	2026	2027	2032	CAGR (%)
Cellular Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Free-Space Optical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Multibearer Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Noncellular Radio Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Optical Fiber Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Satellite RF Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wired Electrical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 521. South Korea Drone Data Link System Market Size, by Noncellular Radio Communications, 2017-2032 (USD Million)

Noncellular Radio Communications	2023	2024	2025	2026	2027	2032	CAGR (%)
Analog Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Analog & Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 522. South Korea Drone Data Link System Market Size, by Network Topology, 2017-2032 (USD Million)

Network Topology	2023	2024	2025	2026	2027	2032	CAGR (%)
Centralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Decentralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Topologies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Point-to-Point Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 523. South Korea Drone Data Link System Market Size, by Link Function, 2017-2032 (USD Million)

Link Function	2023	2024	2025	2026	2027	2032	CAGR (%)
Flight-Management Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Flight & Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mission Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 524. South Korea Drone Data Link System Market Size, by Mission Application, 2017-2032 (USD Million)

Mission Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Agriculture & Forestry	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combat Operations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Communications Relay	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education, Training & Technology Development	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Inspection & Maintenance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intelligence, Surveillance & Reconnaissance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Media Production & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Sport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific Research & Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Search, Rescue & Emergency Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Surveying & Mapping	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transport & Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 525. South Korea Drone Data Link System Market Size, by Transport & Logistics, 2017-2032 (USD Million)

Transport & Logistics	2023	2024	2025	2026	2027	2032	CAGR (%)
Cargo Transport & Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Uncrewed Passenger Transport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 526. South Korea Drone Data Link System Market Size, by End User, 2017-2032 (USD Million)

End User	2023	2024	2025	2026	2027	2032	CAGR (%)
Civilian Government & Public Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Enterprises & Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Individual & Household Consumers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Military & Defense Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonprofit Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 527. South Korea Drone Data Link System Market Size, by Deployment Model, 2017-2032 (USD Million)

Deployment Model	2023	2024	2025	2026	2027	2032	CAGR (%)
Customer-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Provider-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 528. South Korea Drone Data Link System Market Size, by Sales Channel, 2017-2032 (USD Million)

Sales Channel	2023	2024	2025	2026	2027	2032	CAGR (%)
Distribution and Retail Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supplier-Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Value-Added Reseller and Integrator Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 529. South Korea Drone Data Link System Market Size, by Operating Envelope, 2017-2032 (USD Million)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Beyond-Visual-Line-of-Sight Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visual-Line-of-Sight-Only Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 530. South Korea Drone Data Link System Market Size, by Spectrum Access, 2017-2032 (USD Million)

Spectrum Access	2023	2024	2025	2026	2027	2032	CAGR (%)
Individually Licensed or Assigned Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
License-Exempt or Generally Authorized Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mixed Spectrum Authorization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
2. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
3. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.

4. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
5. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.

6. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
7. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.

8. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
9. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.

10. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
11. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

12. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.

13. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
- Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

14. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

15. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

16. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
17. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
18. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
19. Transformation of the Defence Forces: How Ukraine Changed Its System - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.

20. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
21. Safe-T Drone Power Station - Elistair
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
22. Safe-T 2 - Advanced Tethering System Brochure
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.

23. UAV/UGV Products - Advanced Microwave Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
24. Aquila20 FPV Kit - BETAFPV
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.

25. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
26. UAV Data Link and Unmanned Communications - DTC, a Codan Company
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.

27. Summary - ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
28. Mynaric AG - Annual Report 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
29. General Atomics and Kepler Communications Successfully Demonstrate Air-to-Space Optical Communications Capability
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
30. Doodle Labs Announces Launch of Reseller Program
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.

31. Where To Buy - DJI
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
32. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 announcement assigns provisioning, billing and integration responsibilities, supporting a managed value-added channel mechanism without measured penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced delivery relationship concerns a dedicated satellite communications service; it supports a forecast premise, not realized 2032 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March 2026 collaboration names provisioning, billing, monitoring and lifecycle duties, supporting a provider-management commercial premise without disclosing penetration.
33. Statement: Spectrum for Unmanned Aircraft Systems - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An intermediary cannot independently grant network permission, limiting the forecast transfer of customer obligations.
34. DJI O4 Air Unit Series - FAQ
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.

35. Read Our Terms & Conditions - Elsight
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
36. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
37. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.

38. DJI Agriculture Reveals Global Adoption of Agricultural Drones Cuts 51Mt in Carbon Emissions and Saves 410Mts of Water for Farmers Globally
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
39. DJI Agriculture's Annual Report Reveals Drone-Powered Farming Revolution at Brazil's Agrishow 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
40. EHang Reports Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results - SEC Exhibit 99.1
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
41. Zipline to Triple U.S. Manufacturing Facility, Creating More Jobs in AI and Robotics
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
42. Swisscom Broadcast and Nokia Build Joint Drone Network Across Switzerland
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.

43. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
44. UAS Operator Radio Licence Guidance - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
45. Class Licences - Australian Communications and Media Authority
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
46. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.

47. Defence Procurement Agency DOT - Official Post on Fiber-Optic Drone Procurement and 2025 Deliveries
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
48. ITU-T Y.4215 - Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
49. IFRC Drones Group
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
50. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.

19.12. Canada

Table 531. Canada Drone Data Link System Market Size, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Canada	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 532. Canada Drone Data Link System Market Size, by Offering, 2017-2032 (USD Million)

Offering	2023	2024	2025	2026	2027	2032	CAGR (%)
Connectivity Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integration & Lifecycle Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Management & Transmission Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 533. Canada Drone Data Link System Market Size, by Data Link Hardware, 2017-2032 (USD Million)

Data Link Hardware	2023	2024	2025	2026	2027	2032	CAGR (%)
Complete Data Link Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Terminals & Modules	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Support Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 534. Canada Drone Data Link System Market Size, by Connectivity Technology, 2017-2032 (USD Million)

Connectivity Technology	2023	2024	2025	2026	2027	2032	CAGR (%)
Cellular Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Free-Space Optical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Multibearer Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Noncellular Radio Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Optical Fiber Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Satellite RF Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wired Electrical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 535. Canada Drone Data Link System Market Size, by Noncellular Radio Communications, 2017-2032 (USD Million)

Noncellular Radio Communications	2023	2024	2025	2026	2027	2032	CAGR (%)
Analog Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Analog & Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 536. Canada Drone Data Link System Market Size, by Network Topology, 2017-2032 (USD Million)

Network Topology	2023	2024	2025	2026	2027	2032	CAGR (%)
Centralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Decentralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Topologies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Point-to-Point Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 537. Canada Drone Data Link System Market Size, by Link Function, 2017-2032 (USD Million)

Link Function	2023	2024	2025	2026	2027	2032	CAGR (%)
Flight-Management Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Flight & Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mission Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 538. Canada Drone Data Link System Market Size, by Mission Application, 2017-2032 (USD Million)

Mission Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Agriculture & Forestry	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combat Operations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Communications Relay	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education, Training & Technology Development	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Inspection & Maintenance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intelligence, Surveillance & Reconnaissance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Media Production & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Sport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific Research & Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Search, Rescue & Emergency Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Surveying & Mapping	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transport & Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 539. Canada Drone Data Link System Market Size, by Transport & Logistics, 2017-2032 (USD Million)

Transport & Logistics	2023	2024	2025	2026	2027	2032	CAGR (%)
Cargo Transport & Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Uncrewed Passenger Transport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 540. Canada Drone Data Link System Market Size, by End User, 2017-2032 (USD Million)

End User	2023	2024	2025	2026	2027	2032	CAGR (%)
Civilian Government & Public Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Enterprises & Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Individual & Household Consumers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Military & Defense Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonprofit Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 541. Canada Drone Data Link System Market Size, by Deployment Model, 2017-2032 (USD Million)

Deployment Model	2023	2024	2025	2026	2027	2032	CAGR (%)
Customer-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Provider-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 542. Canada Drone Data Link System Market Size, by Sales Channel, 2017-2032 (USD Million)

Sales Channel	2023	2024	2025	2026	2027	2032	CAGR (%)
Distribution and Retail Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supplier-Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Value-Added Reseller and Integrator Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 543. Canada Drone Data Link System Market Size, by Operating Envelope, 2017-2032 (USD Million)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Beyond-Visual-Line-of-Sight Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visual-Line-of-Sight-Only Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 544. Canada Drone Data Link System Market Size, by Spectrum Access, 2017-2032 (USD Million)

Spectrum Access	2023	2024	2025	2026	2027	2032	CAGR (%)
Individually Licensed or Assigned Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
License-Exempt or Generally Authorized Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mixed Spectrum Authorization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
2. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
3. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.

4. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
5. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.

6. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
7. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.

8. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
9. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.

10. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
11. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

12. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.

13. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
- Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

14. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

15. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

16. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
17. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional framework effective November xx.xx 2025 constrains the addressable operator/service pool; it does not directly quantify incremental revenue or unrestricted BVLOS adoption. ([tc.canada.ca](https://tc.canada.ca/en/aviation/drone-safety/2025-summary-changes-canada-drone-regulations))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
18. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.

19. Transformation of the Defence Forces: How Ukraine Changed Its System - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
20. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
21. Safe-T Drone Power Station - Elistair
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
22. Safe-T 2 - Advanced Tethering System Brochure
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.

23. UAV/UGV Products - Advanced Microwave Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
24. Aquila20 FPV Kit - BETAFPV
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.

25. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
26. UAV Data Link and Unmanned Communications - DTC, a Codan Company
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.

27. Summary - ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
28. Mynaric AG - Annual Report 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
29. General Atomics and Kepler Communications Successfully Demonstrate Air-to-Space Optical Communications Capability
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
30. Doodle Labs Announces Launch of Reseller Program
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.

31. Where To Buy - DJI
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
32. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 announcement assigns provisioning, billing and integration responsibilities, supporting a managed value-added channel mechanism without measured penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced delivery relationship concerns a dedicated satellite communications service; it supports a forecast premise, not realized 2032 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March 2026 collaboration names provisioning, billing, monitoring and lifecycle duties, supporting a provider-management commercial premise without disclosing penetration.
33. Statement: Spectrum for Unmanned Aircraft Systems - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An intermediary cannot independently grant network permission, limiting the forecast transfer of customer obligations.
34. DJI O4 Air Unit Series - FAQ
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.

35. Read Our Terms & Conditions - Elsight
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
36. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
37. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.

38. DJI Agriculture Reveals Global Adoption of Agricultural Drones Cuts 51Mt in Carbon Emissions and Saves 410Mts of Water for Farmers Globally
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
39. DJI Agriculture's Annual Report Reveals Drone-Powered Farming Revolution at Brazil's Agrishow 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
40. EHang Reports Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results - SEC Exhibit 99.1
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
41. Zipline to Triple U.S. Manufacturing Facility, Creating More Jobs in AI and Robotics
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
42. Swisscom Broadcast and Nokia Build Joint Drone Network Across Switzerland
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.

43. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
44. UAS Operator Radio Licence Guidance - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
45. Class Licences - Australian Communications and Media Authority
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
46. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.

47. Defence Procurement Agency DOT - Official Post on Fiber-Optic Drone Procurement and 2025 Deliveries
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
48. ITU-T Y.4215 - Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
49. IFRC Drones Group
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
50. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.

19.13. Italy

Table 545. Italy Drone Data Link System Market Size, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Italy	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 546. Italy Drone Data Link System Market Size, by Offering, 2017-2032 (USD Million)

Offering	2023	2024	2025	2026	2027	2032	CAGR (%)
Connectivity Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integration & Lifecycle Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Management & Transmission Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 547. Italy Drone Data Link System Market Size, by Data Link Hardware, 2017-2032 (USD Million)

Data Link Hardware	2023	2024	2025	2026	2027	2032	CAGR (%)
Complete Data Link Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Terminals & Modules	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Support Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 548. Italy Drone Data Link System Market Size, by Connectivity Technology, 2017-2032 (USD Million)

Connectivity Technology	2023	2024	2025	2026	2027	2032	CAGR (%)
Cellular Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Free-Space Optical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Multibearer Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Noncellular Radio Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Optical Fiber Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Satellite RF Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wired Electrical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 549. Italy Drone Data Link System Market Size, by Noncellular Radio Communications, 2017-2032 (USD Million)

Noncellular Radio Communications	2023	2024	2025	2026	2027	2032	CAGR (%)
Analog Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Analog & Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 550. Italy Drone Data Link System Market Size, by Network Topology, 2017-2032 (USD Million)

Network Topology	2023	2024	2025	2026	2027	2032	CAGR (%)
Centralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Decentralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Topologies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Point-to-Point Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 551. Italy Drone Data Link System Market Size, by Link Function, 2017-2032 (USD Million)

Link Function	2023	2024	2025	2026	2027	2032	CAGR (%)
Flight-Management Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Flight & Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mission Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 552. Italy Drone Data Link System Market Size, by Mission Application, 2017-2032 (USD Million)

Mission Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Agriculture & Forestry	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combat Operations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Communications Relay	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education, Training & Technology Development	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Inspection & Maintenance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intelligence, Surveillance & Reconnaissance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Media Production & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Sport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific Research & Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Search, Rescue & Emergency Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Surveying & Mapping	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transport & Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 553. Italy Drone Data Link System Market Size, by Transport & Logistics, 2017-2032 (USD Million)

Transport & Logistics	2023	2024	2025	2026	2027	2032	CAGR (%)
Cargo Transport & Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Uncrewed Passenger Transport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 554. Italy Drone Data Link System Market Size, by End User, 2017-2032 (USD Million)

End User	2023	2024	2025	2026	2027	2032	CAGR (%)
Civilian Government & Public Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Enterprises & Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Individual & Household Consumers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Military & Defense Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonprofit Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 555. Italy Drone Data Link System Market Size, by Deployment Model, 2017-2032 (USD Million)

Deployment Model	2023	2024	2025	2026	2027	2032	CAGR (%)
Customer-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Provider-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 556. Italy Drone Data Link System Market Size, by Sales Channel, 2017-2032 (USD Million)

Sales Channel	2023	2024	2025	2026	2027	2032	CAGR (%)
Distribution and Retail Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supplier-Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Value-Added Reseller and Integrator Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 557. Italy Drone Data Link System Market Size, by Operating Envelope, 2017-2032 (USD Million)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Beyond-Visual-Line-of-Sight Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visual-Line-of-Sight-Only Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 558. Italy Drone Data Link System Market Size, by Spectrum Access, 2017-2032 (USD Million)

Spectrum Access	2023	2024	2025	2026	2027	2032	CAGR (%)
Individually Licensed or Assigned Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
License-Exempt or Generally Authorized Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mixed Spectrum Authorization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
2. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
3. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.

4. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
5. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.

6. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
7. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.

8. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
9. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.

10. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
11. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

12. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.

13. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
- Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

14. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

15. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

16. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
17. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
18. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
19. Transformation of the Defence Forces: How Ukraine Changed Its System - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.

20. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
21. Safe-T Drone Power Station - Elistair
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
22. Safe-T 2 - Advanced Tethering System Brochure
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.

23. UAV/UGV Products - Advanced Microwave Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
24. Aquila20 FPV Kit - BETAFPV
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.

25. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
26. UAV Data Link and Unmanned Communications - DTC, a Codan Company
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.

27. Summary - ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
28. Mynaric AG - Annual Report 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
29. General Atomics and Kepler Communications Successfully Demonstrate Air-to-Space Optical Communications Capability
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
30. Doodle Labs Announces Launch of Reseller Program
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.

31. Where To Buy - DJI
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
32. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 announcement assigns provisioning, billing and integration responsibilities, supporting a managed value-added channel mechanism without measured penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced delivery relationship concerns a dedicated satellite communications service; it supports a forecast premise, not realized 2032 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March 2026 collaboration names provisioning, billing, monitoring and lifecycle duties, supporting a provider-management commercial premise without disclosing penetration.
33. Statement: Spectrum for Unmanned Aircraft Systems - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An intermediary cannot independently grant network permission, limiting the forecast transfer of customer obligations.
34. DJI O4 Air Unit Series - FAQ
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.

35. Read Our Terms & Conditions - Elsight
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
36. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
37. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.

38. DJI Agriculture Reveals Global Adoption of Agricultural Drones Cuts 51Mt in Carbon Emissions and Saves 410Mts of Water for Farmers Globally
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
39. DJI Agriculture's Annual Report Reveals Drone-Powered Farming Revolution at Brazil's Agrishow 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
40. EHang Reports Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results - SEC Exhibit 99.1
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
41. Zipline to Triple U.S. Manufacturing Facility, Creating More Jobs in AI and Robotics
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
42. Swisscom Broadcast and Nokia Build Joint Drone Network Across Switzerland
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.

43. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
44. UAS Operator Radio Licence Guidance - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
45. Class Licences - Australian Communications and Media Authority
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
46. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.

47. Defence Procurement Agency DOT - Official Post on Fiber-Optic Drone Procurement and 2025 Deliveries
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
48. ITU-T Y.4215 - Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
49. IFRC Drones Group
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
50. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.

19.14. Spain

Table 559. Spain Drone Data Link System Market Size, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Spain	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 560. Spain Drone Data Link System Market Size, by Offering, 2017-2032 (USD Million)

Offering	2023	2024	2025	2026	2027	2032	CAGR (%)
Connectivity Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integration & Lifecycle Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Management & Transmission Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 561. Spain Drone Data Link System Market Size, by Data Link Hardware, 2017-2032 (USD Million)

Data Link Hardware	2023	2024	2025	2026	2027	2032	CAGR (%)
Complete Data Link Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Terminals & Modules	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Support Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 562. Spain Drone Data Link System Market Size, by Connectivity Technology, 2017-2032 (USD Million)

Connectivity Technology	2023	2024	2025	2026	2027	2032	CAGR (%)
Cellular Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Free-Space Optical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Multibearer Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Noncellular Radio Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Optical Fiber Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Satellite RF Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wired Electrical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 563. Spain Drone Data Link System Market Size, by Noncellular Radio Communications, 2017-2032 (USD Million)

Noncellular Radio Communications	2023	2024	2025	2026	2027	2032	CAGR (%)
Analog Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Analog & Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 564. Spain Drone Data Link System Market Size, by Network Topology, 2017-2032 (USD Million)

Network Topology	2023	2024	2025	2026	2027	2032	CAGR (%)
Centralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Decentralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Topologies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Point-to-Point Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 565. Spain Drone Data Link System Market Size, by Link Function, 2017-2032 (USD Million)

Link Function	2023	2024	2025	2026	2027	2032	CAGR (%)
Flight-Management Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Flight & Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mission Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 566. Spain Drone Data Link System Market Size, by Mission Application, 2017-2032 (USD Million)

Mission Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Agriculture & Forestry	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combat Operations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Communications Relay	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education, Training & Technology Development	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Inspection & Maintenance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intelligence, Surveillance & Reconnaissance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Media Production & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Sport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific Research & Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Search, Rescue & Emergency Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Surveying & Mapping	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transport & Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 567. Spain Drone Data Link System Market Size, by Transport & Logistics, 2017-2032 (USD Million)

Transport & Logistics	2023	2024	2025	2026	2027	2032	CAGR (%)
Cargo Transport & Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Uncrewed Passenger Transport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 568. Spain Drone Data Link System Market Size, by End User, 2017-2032 (USD Million)

End User	2023	2024	2025	2026	2027	2032	CAGR (%)
Civilian Government & Public Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Enterprises & Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Individual & Household Consumers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Military & Defense Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonprofit Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 569. Spain Drone Data Link System Market Size, by Deployment Model, 2017-2032 (USD Million)

Deployment Model	2023	2024	2025	2026	2027	2032	CAGR (%)
Customer-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Provider-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 570. Spain Drone Data Link System Market Size, by Sales Channel, 2017-2032 (USD Million)

Sales Channel	2023	2024	2025	2026	2027	2032	CAGR (%)
Distribution and Retail Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supplier-Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Value-Added Reseller and Integrator Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 571. Spain Drone Data Link System Market Size, by Operating Envelope, 2017-2032 (USD Million)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Beyond-Visual-Line-of-Sight Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visual-Line-of-Sight-Only Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 572. Spain Drone Data Link System Market Size, by Spectrum Access, 2017-2032 (USD Million)

Spectrum Access	2023	2024	2025	2026	2027	2032	CAGR (%)
Individually Licensed or Assigned Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
License-Exempt or Generally Authorized Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mixed Spectrum Authorization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
2. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
3. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.

4. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
5. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.

6. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
7. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.

8. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
9. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.

10. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
11. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

12. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.

13. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
- Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

14. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

15. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

16. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
17. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
18. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
19. Transformation of the Defence Forces: How Ukraine Changed Its System - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.

20. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
21. Safe-T Drone Power Station - Elistair
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
22. Safe-T 2 - Advanced Tethering System Brochure
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.

23. UAV/UGV Products - Advanced Microwave Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
24. Aquila20 FPV Kit - BETAFPV
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.

25. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
26. UAV Data Link and Unmanned Communications - DTC, a Codan Company
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.

27. Summary - ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
28. Mynaric AG - Annual Report 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
29. General Atomics and Kepler Communications Successfully Demonstrate Air-to-Space Optical Communications Capability
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
30. Doodle Labs Announces Launch of Reseller Program
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.

31. Where To Buy - DJI
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
32. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 announcement assigns provisioning, billing and integration responsibilities, supporting a managed value-added channel mechanism without measured penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced delivery relationship concerns a dedicated satellite communications service; it supports a forecast premise, not realized 2032 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March 2026 collaboration names provisioning, billing, monitoring and lifecycle duties, supporting a provider-management commercial premise without disclosing penetration.
33. Statement: Spectrum for Unmanned Aircraft Systems - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An intermediary cannot independently grant network permission, limiting the forecast transfer of customer obligations.
34. DJI O4 Air Unit Series - FAQ
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.

35. Read Our Terms & Conditions - Elsight
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
36. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
37. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.

38. DJI Agriculture Reveals Global Adoption of Agricultural Drones Cuts 51Mt in Carbon Emissions and Saves 410Mts of Water for Farmers Globally
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
39. DJI Agriculture's Annual Report Reveals Drone-Powered Farming Revolution at Brazil's Agrishow 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
40. EHang Reports Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results - SEC Exhibit 99.1
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
41. Zipline to Triple U.S. Manufacturing Facility, Creating More Jobs in AI and Robotics
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
42. Swisscom Broadcast and Nokia Build Joint Drone Network Across Switzerland
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.

43. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
44. UAS Operator Radio Licence Guidance - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
45. Class Licences - Australian Communications and Media Authority
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
46. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.

47. Defence Procurement Agency DOT - Official Post on Fiber-Optic Drone Procurement and 2025 Deliveries
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
48. ITU-T Y.4215 - Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
49. IFRC Drones Group
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
50. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.

19.15. Mexico

Table 573. Mexico Drone Data Link System Market Size, 2017-2032 (USD Million)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Mexico	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 574. Mexico Drone Data Link System Market Size, by Offering, 2017-2032 (USD Million)

Offering	2023	2024	2025	2026	2027	2032	CAGR (%)
Connectivity Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integration & Lifecycle Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Management & Transmission Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 575. Mexico Drone Data Link System Market Size, by Data Link Hardware, 2017-2032 (USD Million)

Data Link Hardware	2023	2024	2025	2026	2027	2032	CAGR (%)
Complete Data Link Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Data Link Terminals & Modules	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Link Support Hardware	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 576. Mexico Drone Data Link System Market Size, by Connectivity Technology, 2017-2032 (USD Million)

Connectivity Technology	2023	2024	2025	2026	2027	2032	CAGR (%)
Cellular Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Free-Space Optical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Multibearer Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Noncellular Radio Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Optical Fiber Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Satellite RF Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wired Electrical Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 577. Mexico Drone Data Link System Market Size, by Noncellular Radio Communications, 2017-2032 (USD Million)

Noncellular Radio Communications	2023	2024	2025	2026	2027	2032	CAGR (%)
Analog Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Analog & Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Digital Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 578. Mexico Drone Data Link System Market Size, by Network Topology, 2017-2032 (USD Million)

Network Topology	2023	2024	2025	2026	2027	2032	CAGR (%)
Centralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Decentralized Multipoint Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Topologies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Point-to-Point Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 579. Mexico Drone Data Link System Market Size, by Link Function, 2017-2032 (USD Million)

Link Function	2023	2024	2025	2026	2027	2032	CAGR (%)
Flight-Management Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Flight & Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mission Payload Communications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 580. Mexico Drone Data Link System Market Size, by Mission Application, 2017-2032 (USD Million)

Mission Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Agriculture & Forestry	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combat Operations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Communications Relay	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education, Training & Technology Development	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Inspection & Maintenance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intelligence, Surveillance & Reconnaissance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Media Production & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Sport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific Research & Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Search, Rescue & Emergency Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Surveying & Mapping	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transport & Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 581. Mexico Drone Data Link System Market Size, by Transport & Logistics, 2017-2032 (USD Million)

Transport & Logistics	2023	2024	2025	2026	2027	2032	CAGR (%)
Cargo Transport & Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Uncrewed Passenger Transport	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 582. Mexico Drone Data Link System Market Size, by End User, 2017-2032 (USD Million)

End User	2023	2024	2025	2026	2027	2032	CAGR (%)
Civilian Government & Public Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Enterprises & Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Individual & Household Consumers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Military & Defense Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonprofit Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 583. Mexico Drone Data Link System Market Size, by Deployment Model, 2017-2032 (USD Million)

Deployment Model	2023	2024	2025	2026	2027	2032	CAGR (%)
Customer-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Network Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Provider-Managed Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 584. Mexico Drone Data Link System Market Size, by Sales Channel, 2017-2032 (USD Million)

Sales Channel	2023	2024	2025	2026	2027	2032	CAGR (%)
Distribution and Retail Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supplier-Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Value-Added Reseller and Integrator Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 585. Mexico Drone Data Link System Market Size, by Operating Envelope, 2017-2032 (USD Million)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Beyond-Visual-Line-of-Sight Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visual-Line-of-Sight-Only Deployments	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 586. Mexico Drone Data Link System Market Size, by Spectrum Access, 2017-2032 (USD Million)

Spectrum Access	2023	2024	2025	2026	2027	2032	CAGR (%)
Individually Licensed or Assigned Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
License-Exempt or Generally Authorized Spectrum	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mixed Spectrum Authorization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Radio Links	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2025 Civil Aviation Industry Development Statistical Bulletin - Civil Aviation Administration of China
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: China reported xx.xx registered drones at year-end 2025, up xx.xx%, including xx.xx medium and large drones. These observations constrain civilian installation and premium-equipment assumptions; registrations are not sales.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The reported expansion of China's registered fleet and operating organizations supports continued civilian demand in the 2026 nowcast, without extending the 2025 growth rate globally.
2. Compendium to FAA Aerospace Forecast FY 2025-2045: Unmanned Aircraft Systems and Advanced Air Mobility
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: The FAA distinguishes approximately xx.xx effective or active commercial drones from approximately xx.xx cumulative commercial registrations in 2024. This prevents treating all registrations as operating installations.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The FAA's recreational and commercial fleet estimates provide independent civilian demand constraints, with materially different active and cumulative populations.
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The FAA's projected slowing of fleet expansion through 2029 constrains the model's mature civilian hardware trajectory. It does not establish the returned 2032 market value.
3. EASA Launches Drone Economy Dashboard in Fourth Release of Innovative Air Mobility Hub
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: EASA reported more than two million registered European drone operators in May 2025. Operator counts constrain the European purchasing pool but require explicit aircraft-per-operator, activity and replacement assumptions.

4. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DJI's January xx.xx 2025 launch announcement states retail prices of USD xx.xx and USD xx.xx for the O4 Air Unit offerings. These are price comparables, not shipment observations; camera value and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 launch states USD xx.xx and USD xx.xx retail prices; communications attribution and supplier-equivalent discounts are modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated digital-video products provide consumer digital-link price comparables, not shipment or signaling-share observations.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January 2025 USD xx.xx and USD xx.xx retail packages constrain civilian unit values; cameras and channel margins require deductions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Content-creation positioning supports a media demand setting, not a shipment or entertainment share.
5. Telemetry Radios - Holybro Store
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The retrieved manufacturer catalog lists entry telemetry products from USD xx.xx and Microhard-branded packages from USD xx.xx. Current listed prices provide a reasonableness check for modeled equipment values, not observed 2025 realized prices.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current manufacturer listings include telemetry products from USD xx.xx and Microhard products from USD xx.xx constraining endpoint price relationships.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately priced converters and antenna-extension cables support lower-valued link-support components; adjacent remote-identification products are excluded.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier store provides a direct purchase route and dealer/OEM links, supporting distinct channel alternatives without measured sales weights.

6. Motorola Solutions - March 2, 2026 Conference Transcript
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Motorola Solutions' CFO reported Silvus calendar-2025 revenue of USD xx.xx. Only the modeled airborne-link and equipment portions enter the supplier cross-check; total MANET revenue is not treated as drone-link revenue.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The company speaker stated a 2026 Silvus revenue expectation of USD xx.xx, providing a dated supplier-level growth calibration rather than a global forecast.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A company speaker reported Silvus calendar-2025 revenue of USD xx.xx and a USD xx.xx 2026 expectation; drone and equipment attribution is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silvus business scale supplies a quantitative mesh-capable equipment check, not an observed decentralized deployment share.
7. Codan FY2025 Results - ASX Announcement, August 21, 2025
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Codan reported that FY2025 unmanned-systems revenue of approximately AUD xx.xx more than doubled the previous year's result. This constrains the historical premium-link expansion.
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue provides a financial anchor, subject to calendar-period, airborne-attribution and equipment-versus-service adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately AUD xx.xx FY2025 unmanned-systems revenue supplies the first financial input for DTC's calendar and airborne-equipment bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported mesh-radio business activity constrains qualified digital supply, after airborne and equipment attribution assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unmanned mesh-capable supplier revenue supports available multipoint equipment but does not establish its actual deployment topology.

8. Codan H1 FY2026 Investor Presentation - February 19, 2026
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: DTC's July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input for the calendar-2025 revenue bridge.
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The disclosed growth and approximately balanced conflict/non-conflict application mix support premium demand while qualifying dependence on wartime procurement.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: July-December 2025 unmanned-systems revenue of approximately AUD xx.xx, up xx.xx%, supplies the second calendar-bridge input.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately balanced conflict/non-conflict applications qualify an exclusively wartime adoption thesis; disclosed revenue does not measure peer-network incidence.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DTC's AUD xx.xx unmanned-systems revenue and approximately half conflict-related mix constrain premium purchasing; conflict revenue is not synonymous with combat missions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Non-conflict unmanned revenue supplies a countercheck against assigning all premium defense activity to current combat.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defense and unmanned revenue constrain the military purchasing assumption; non-conflict geography does not establish a civilian customer.
9. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
   - Evidence informing the 2025 market-value input; displayed series and growth include calculations: The official 2025 annual exchange rate of USD xx.xx per Australian dollar converts the calendar-bridged DTC revenue into the common USD valuation basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 annual USD xx.xx per AUD observation converts the DTC proxy to the inherited USD basis.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The exchange-rate input supports the USD-denominated mesh-capable supplier cross-check, not topology penetration.

10. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Elsight disclosed 2025 revenue of USD xx.xx comprising physical goods of USD xx.xx data usage of USD xx.xx and service-level agreements and other services of USD xx.xx. The separate streams constrain hardware attribution and recurring-service assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Audited 2025 physical-goods revenue of USD xx.xx supports the equipment/service bridge, not a global hardware percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and software income is included within USD xx.xx of service-level agreements and other services; software attribution remains modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 data-usage revenue of USD xx.xx provides an observed separately billed connectivity input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported service streams support paid continuing obligations but do not isolate global integration/lifecycle revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo-centred business activity constrains premium multibearer scale; adjacent non-UAV activity requires exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One European UAV-sector customer contributed xx.xx% of 2025 revenue; concentration does not identify its sales channel.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately disclosed goods, data-usage and service revenues provide a quantitative service-mix check; recurring revenue does not establish transferred management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The service/goods distinction prevents automatically classifying customer-administered paid software as externally managed networks.
11. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
    - Evidence informing the 2025 market-value input; displayed series and growth include calculations: Mobilicom reported approximately USD xx.xx of 2025 revenue. This provides a small-supplier scale check and cautions against extrapolating exceptional growth at another supplier across the market.

12. Ukraine Ministry of Defence - Key 2025 Highlights, December 27, 2025
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: Ukraine's Ministry of Defence reported three million FPV drones received during 2025. The model values only attributable communications equipment, not complete drones, weapons or mission output.
- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The realized 2025 delivery observation constrains the 2026 attritable-link demand baseline; it is not a 2026 delivery observation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The ministry's three million 2025 FPV receipts constrain the procurement-driven attritable communications baseline; only attributable link value is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official defense receipts establish military commissioning rather than assigning procurement to commercial aircraft suppliers.

13. Armed Forces to Receive Three Million FPV Drones by Year-End - Cabinet of Ministers of Ukraine
- Evidence informing the 2024 market-value input; displayed series and growth include calculations: The December xx.xx 2025 government statement described three million FPV deliveries as almost xx.xx times the previous year's level, implying approximately xx.xx comparable 2024 deliveries. This is a derived historical input, not an exact published count.

14. The Drone Databook - Center for the Study of the Drone at Bard College, 2019
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: The academic inventory study identified xx.xx confirmed military drones in service in 2019, with the actual population likely exceeding xx.xx. Its all-class inventory constrains, but does not directly measure, the higher-value installed cohort.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The documented international installed base provides a historical constraint for the modeled 2025 medium/large-aircraft replacement and sustainment pool. The 2025 stock remains an estimate.

15. L3Harris Reports Fourth-Quarter and Second-Half 2019 Results
- Evidence informing the 2019 market-value input; displayed series and growth include calculations: L3Harris reported an MQ-xx.xx airborne-datalink production order that brought the awarded IDIQ value to USD xx.xx. This establishes a historical equipment-program scale, not annual recognized revenue.
- Evidence informing the 2025 market-value input; displayed series and growth include calculations: The identified airborne-link procurement provides a commercial scale check for the traditional high-value communications cohort; no contract ceiling is added directly to 2025 sales.

16. Part 107 Waivers - Federal Aviation Administration
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The FAA's operation-specific waiver pathway supports retaining an authorization constraint on remote-service adoption rather than equating marketed BVLOS capability with deployable demand.
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: Operation-specific permission remains a forecast adoption premise; this source does not establish the modeled 2027 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operation-specific waivers constrain BVLOS purchasing adoption; product capability is not a completed authorization.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Compliant VLOS operations and departures requiring waivers are distinct; long-range hardware does not determine the allocation.
17. 2025 Summary of Changes to Canada's Drone Regulations - Transport Canada
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Canada's lower-risk BVLOS pathway became applicable November xx.xx 2025 under defined conditions. This supports incremental addressable demand, not unrestricted global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The conditional lower-risk BVLOS framework effective November xx.xx 2025 supports incremental accessible demand, not unrestricted Global access.
18. FAA Aerospace Forecast Fiscal Years 2019-2039 - Historical Fleet Summary
    - Evidence informing the 2018 market-value input; displayed series and growth include calculations: The FAA's historical publication identifies a 2018 recreational fleet of approximately xx.xx and commercial fleet of xx.xx. These constrain the pre-2020 civilian backcast; subsequent forecast figures are not treated as realized observations.
19. Transformation of the Defence Forces: How Ukraine Changed Its System - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official account reports xx.xx fiber-controlled drone deliveries during 2025; only attributable communications value enters the model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed guided-fiber procurement constrains substitution within the attritable cohort and prevents allocating its entire value to radio.

20. Military Receives First 100,000 FPV Drones through DOT-Chain Defence - Ministry of Defence of Ukraine
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 record reports over xx.xx channel deliveries, nearly one-third fiber; this selected late-year sample is not extrapolated globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The platform links manufacturers, customers and the procurement agency; payment coordination alone does not establish intermediary resale.
21. Safe-T Drone Power Station - Elistair
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current offering includes an optical-fiber option and reports more than 2,000 systems in use; installed stock is a scale check, not 2025 sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Safe-T offers an optical-fiber option and reports over xx.xx cumulative deployed units; optical-option incidence and annual communications revenue are not disclosed.
22. Safe-T 2 - Advanced Tethering System Brochure
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier brochure separately identifies electrical data-bearing tether communications; this is historical category evidence, not current revenue disclosure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An optional optical-fiber communications configuration supports separation of guided optical and electrical data paths.

23. UAV/UGV Products - Advanced Microwave Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier distinguishes communications endpoints from supporting amplifiers; UAV attribution and value weights remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting amplifiers establish a commercial role distinct from complete systems and endpoints.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Analog video products support the analog commercial category without establishing its transaction prevalence.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital data products support the separate digital category; catalog counts are not used as market weights.
24. Aquila20 FPV Kit - BETAFPV
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed kit combines analog video and digital remote-control connectivity; whole-aircraft value is excluded and mixed-signaling prevalence remains assumed.

25. SkyLine UAS Command & Control - C2 for BVLOS
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paired airborne and ground radios establish a complete communications-package option; indivisible package pricing is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identified airborne and ground products support endpoint purchasing alongside complete packages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud link routing, monitoring and management support a separable communications-software role; unrelated fleet and awareness functions are excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The marketed ecosystem combines cellular, noncellular and satellite relationships; available capability does not establish paid activation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined control and payload capability supports the integrated-function boundary but not its commercial indivisibility or market share.
26. UAV Data Link and Unmanned Communications - DTC, a Codan Company
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier offers pre-integration and continuing support, establishing an integration/lifecycle business role without a separately billed global value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same radio family supports two-endpoint relationships; mesh-capable radio revenue is not automatically mesh-deployment revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial mesh support establishes available decentralized arrangements, not purchased deployment prevalence.

27. Summary - ITU-T F.749.10: Requirements for Communication Services of Civilian Unmanned Aerial Vehicles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The standards summary distinguishes flight-control and flight-data transport, supporting the flight-management attribution boundary.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mission-payload services include imagery, sensor-data transport and signal relay, supporting a separately attributable payload category.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Coexisting communications purposes support the combined-function analytical boundary but do not establish an indivisible purchase.
28. Mynaric AG - Annual Report 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: AIR revenue was EUR xx.xx in 2022 and zero in 2023, with the existing HAWK production basis discontinued; this materially limits commercialization assumptions.
29. General Atomics and Kepler Communications Successfully Demonstrate Air-to-Space Optical Communications Capability
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 airborne optical demonstration is not an identified commercial unmanned-aircraft delivery and therefore does not establish the modeled numerator.
30. Doodle Labs Announces Launch of Reseller Program
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The UAV-facing reseller program explicitly includes distributors; program availability is not a revenue-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Value-added resellers and systems integrators are included, supporting distinct channel roles rather than supplier-brand classification.

31. Where To Buy - DJI
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official online stores establish a supplier-direct route distinct from authorized intermediaries.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Authorized retail and dealer routes are separately recognized, with warranty consequences for unauthorized purchases; no channel sales split is disclosed.
32. Galaxy 1 Partners with Viasat to Deliver Rapid, Scalable and Secure Communications for Uncrewed Aircraft
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 announcement assigns provisioning, billing and integration responsibilities, supporting a managed value-added channel mechanism without measured penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced delivery relationship concerns a dedicated satellite communications service; it supports a forecast premise, not realized 2032 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March 2026 collaboration names provisioning, billing, monitoring and lifecycle duties, supporting a provider-management commercial premise without disclosing penetration.
33. Statement: Spectrum for Unmanned Aircraft Systems - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered mobile-network use requires operator agreement; this constrains forecast cellular adoption rather than proving global access.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Satellite use requires the relevant network relationship and separate aviation compliance, qualifying unrestricted service-penetration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: An intermediary cannot independently grant network permission, limiting the forecast transfer of customer obligations.
34. DJI O4 Air Unit Series - FAQ
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party goggles are unsupported and O3 accessory compatibility is partial, supporting offering-specific switching constraints rather than universal replacement interoperability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Offering-specific goggles compatibility and partial accessory compatibility qualify replacement assumptions; they do not quantify household sales or universal switching costs.

35. Read Our Terms & Conditions - Elsight
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Embedded software rights and automatically renewing cloud services support entitlement-specific allocation; license existence alone does not establish separately attributable revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Unlisted network connections and third-party integration are excluded from standard scope, supporting separation of connectivity from integration deliverables.
36. Uncrewed Aircraft Systems - NIST Public Safety Communications Research
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The public-safety portfolio distinguishes single-link, multi-UAS and mesh settings; these are independent participant distinctions, not purchased prevalence observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-UAS communications provide a demand-side basis for multipoint classification without identifying the share using a central coordinating node.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mesh and multi-hop settings support decentralized participant relationships independently of bearer technology.
37. CY 2024 Small Unmanned Aircraft Systems Survey Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 survey's overlapping activity responses constrain civilian purchasing assumptions, not market shares; real estate and construction are prominent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activity responses provide a civilian construction/real-estate demand check for the modeled surveying allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Recreational-only activity among Part xx.xx respondents demonstrates that registration type is not an institutional purchasing sector.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-organization waiver intentions constrain, but do not verify, future authorized BVLOS uptake.

38. DJI Agriculture Reveals Global Adoption of Agricultural Drones Cuts 51Mt in Carbon Emissions and Saves 410Mts of Water for Farmers Globally
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI reports over xx.xx of its agricultural drones in use at end-2025; stock constrains installation and replacement assumptions but is not annual sales.
39. DJI Agriculture's Annual Report Reveals Drone-Powered Farming Revolution at Brazil's Agrishow 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: DJI's approximately xx.xx agricultural drones in use at end-2024 provide the preceding stock comparison for the 2025 purchasing-flow calibration.
40. EHang Reports Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results - SEC Exhibit 99.1
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx eVTOL deliveries in 2025 constrain passenger-program installation scale; variants and communications-only values remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aircraft delivery observations constrain the passenger component of the parent transport budget, not complete-aircraft inclusion.
41. Zipline to Triple U.S. Manufacturing Facility, Creating More Jobs in AI and Robotics
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Over xx.xx cumulative deliveries and planned capacity up to xx.xx aircraft annually constrain cargo adoption; neither is recognized communications revenue or realized annual production.
42. Swisscom Broadcast and Nokia Build Joint Drone Network Across Switzerland
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced infrastructure-inspection service supports operator-mediated purchasing and the conditional inspection uptake premise, not completed nationwide deployment.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-responder services establish an emergency purchasing alternative without verifying incident-specific availability.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A commercial service operator coordinates underlying infrastructure and data storage, supporting separation from the commissioning mission customer.

43. Easy Access Rules for Unmanned Aircraft Systems - Revision from June 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: External-service provisions require allocation of operator/provider responsibilities; they support responsibility-based classification, not a measured hybrid contract share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Operator-retained responsibilities prevent equating an external service with complete provider management.
44. UAS Operator Radio Licence Guidance - Ofcom
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance distinguishes exempt drone equipment from operator-license equipment and requires relevant network agreement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Generally exempt equipment is a distinct conditional permission route, not an absence of applicable rules.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Radio authorization expressly does not confer aviation authorization, qualifying deployment-dependent uptake assumptions.
45. Class Licences - Australian Communications and Media Authority
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Class-authorized terminals can communicate with licensed base or space stations; terminal and underlying network permission must be distinguished.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Assigned apparatus permission and underlying network licensing constrain, but do not directly measure, the assigned-spectrum allocation.
46. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud and on-premises options do not independently establish retained or transferred network-management rights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cellular, radio and satellite combinations establish an available multibearer offering, not jurisdiction-specific mixed authorization or its sales share.

47. Defence Procurement Agency DOT - Official Post on Fiber-Optic Drone Procurement and 2025 Deliveries
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official procurement agency reports xx.xx fiber-optic drone deliveries under its contracts in 2025, constraining commercial non-radio equivalents; only attributable communications value is included.
48. ITU-T Y.4215 - Use Cases, Requirements and Capabilities of Unmanned Aircraft Systems for the Internet of Things
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The recommendation independently identifies UAS-aided relaying as a mission output; standards recognition does not disclose commercial purchasing incidence.
49. IFRC Drones Group
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The humanitarian institutional demand setting supports a separate nonprofit purchasing branch, not a measured procurement share.
50. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate complete-platform and component/software frameworks support qualification-sensitive defense purchasing; selections and additions are not revenue weights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Program verification and capability-development purchasing establish a development context without quantifying worldwide link purchases.

20. Competitive Landscape

20.1. Market Share Analysis, 2025

Supported competitive positioning follows the buyer's acceptance boundary rather than corporate scale. A merchant radio supplier competes for an aircraft manufacturer's component selection; a configured-system supplier competes for package accountability; a network provider competes for continuing communications access. ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪

Named incorporation relationships provide useful access evidence without establishing portable qualification. ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ An integrator route is useful when the buyer needs that defined deliverable; direct component purchasing preserves sourcing control while retaining coordination duties.

Defense-program and government-screening evidence answer different access questions. ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ Procurement approvers should confirm the exact offering and current access status rather than transfer qualification from another program, a supplier name or a portfolio description.

Installed commitments can change the practical competitive set. DJI's O4 documentation limits goggle compatibility and accessory reuse, while permitting third-party controller relationships under its stated conditions. ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪

Regional connectivity propositions compete on service scope as well as equipment. ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ Buyers should

compare the territory, aircraft eligibility, included software and escalation owner actually offered, without assuming that a regional relationship establishes Global fulfillment.

[redacted] It does not independently overcome aircraft acceptance, procurement eligibility or network permission. Direct entry is more suitable when the entrant can obtain those commitments itself and the customer values direct supplier control; otherwise, a clearly bounded integration relationship can reduce coordination burden at the cost of control over the packaged deliverable.

Figure 42. Global Drone Data Link System Market Share, by Key Player, 2025

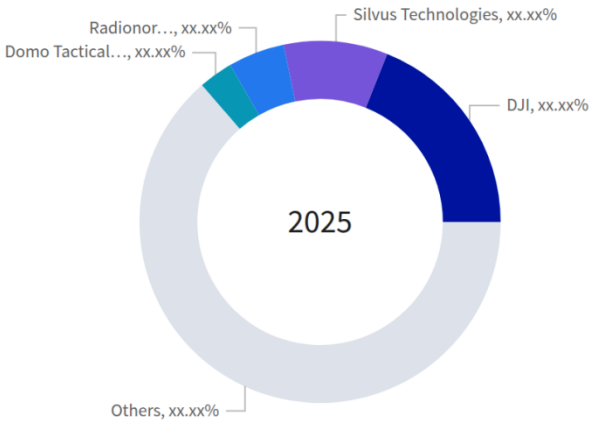

Table 587. Global Drone Data Link System Market Share, by Key Player, 2025

Key Player	Share (%)
AeroVironment, Inc.	xx.xx
Alpi Aviation	xx.xx
ATMOSPHERE	xx.xx
Baltic Viper	xx.xx
BATCOMMS	xx.xx
Baykar	xx.xx
Beyond Vision	xx.xx
CADDXFPV	xx.xx
Coalas Tech	xx.xx
Creomagic Ltd.	xx.xx
CTech	xx.xx
Denel Dynamics	xx.xx

Table 587 - continued

Key Player	Share (%)
Digital Micro Devices	xx.xx
DJI	xx.xx
Domo Tactical Communications	xx.xx
Droniq GmbH	xx.xx
Elistair	xx.xx
Elsight	xx.xx
Embention	xx.xx
Freefly Systems	xx.xx
FrSky	xx.xx
General Atomics Aeronautical Systems, Inc.	xx.xx
Gilat Satellite Networks	xx.xx
Gotonomi	xx.xx
Hoverfly Technologies, Inc.	xx.xx
Iridium	xx.xx
KDDI SmartDrone Inc.	xx.xx
LAT Defence	xx.xx
MicroPilot	xx.xx
Milkor (Pty) Ltd.	xx.xx
Mobilicom	xx.xx
Nokia	xx.xx
Ondas Inc.	xx.xx
Orqa d.o.o.	xx.xx
Radionor Communications	xx.xx
Reactive Drone	xx.xx
Shenzhen Suntor Technology Co., Ltd.	xx.xx
Silvus Technologies	xx.xx
Sky-Drones Technologies Ltd	xx.xx
Skydio	xx.xx
Steatite Ltd	xx.xx
TrellisWare Technologies, Inc.	xx.xx
UVS Dynamics	xx.xx
WB GROUP	xx.xx

Table 587 - continued

Key Player	Share (%)
Xmobots	xx.xx
YANGDA	xx.xx
Others	xx.xx

Sources & Evidence

1. Velaris - BVLOS connectivity for UAVs
   - The service proposition establishes a purchasing relationship distinct from merchant component supply. ([viasat.com](https://www.viasat.com/aviation/advanced-air-mobility/velaris/))
2. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
   - DIU's February xx.xx 2025 announcement distinguishes verification selections from additions and includes Mobilicom component activity. ([diu.mil](https://www.diu.mil/latest/blue-uas-refresh-list-and-framework-platforms-and-capabilities-selected))
3. Software-Defined Radios | Cubic
   - The published component and integrated-package alternatives support defining the purchasing boundary before supplier comparison. ([cubic.com](https://www.cubic.com/defense/secure-communications/software-defined-radios))
4. Triad High Power Radio Systems For Unmanned Land Air Sea
   - The packages establish an integration purchasing route above originating radio supply. ([triadrf.com](https://triadrf.com/radio-systems/))
5. Mesh Rider Radios - Doodle Labs
   - The identifiable radio offering supports comparison of component purchasing with an aircraft-level package incorporating that supplier. ([doodlelabs.com](https://doodlelabs.com/products/radios))
6. Astro - US Made Commercial Drone
   - Astro's named Doodle Labs relationship supports an account-access example, not interchangeability with a separately purchased radio. ([freeflysystems.com](https://freeflysystems.com/astro))
   - Evidence informing base-year company-share estimates: The current business page reports thousands of units in the field and identifies Doodle Labs, LTE and AuterionOS within Astro. It constrains installed scale and upstream deductions, not the assumed 2025 stock, turnover or incremental realization. ([freeflysystems.com](https://freeflysystems.com/astro))
7. Microhard - Products
   - The originating catalog provides a component purchasing boundary distinct from downstream branded packages. ([microhardcorp.com](https://www.microhardcorp.com/products.php))
8. Datalinks | UAV Navigation
   - The named TELEM07 package supports a compatibility-defined integration route distinct from direct modem procurement. ([uavnavigation.com](https://uavnavigation.com/products/peripherals/datalinks))
9. SkyLink - uAvionix
   - The identifiable equipment-and-management relationship supports defining the procurement deliverable before supplier comparison. ([uavionix.com](https://uavionix.com/product/skylink/))
10. DJI O4 Air Unit Series - FAQ - DJI
    - DJI excludes third-party O4 flight goggles, permits third-party controller relationships under stated conditions and identifies limits on accessory compatibility. ([dji.com](https://www.dji.com/o4-air-unit/faq))
11. Arycom announcement of Velaris UAV connectivity with Viasat and Gotonomi
    - The named partner relationship supports a channel proposition distinct from originating network ownership. ([linkedin.com](https://www.linkedin.com/posts/arycom_velaris-arycom-viasat-activity-xx.xx-Nvhd))

12. Patria has signed an agreement with Airbus Defence and Space for SIRTAP datalink solution
    - Patria's company-issued February xx.xx 2025 announcement identifies a CANDL-based SIRTAP agreement with Airbus Defence and Space covering airborne and ground systems. ([news.cision.com](https://news.cision.com/patria-group/r/patria-has-signed-an-agreement-with-airbus-defence-and-space-for-sirtap-datalink-solution%2Cc4105786))
13. ドローン向け上空 LTE SIM なら上空電波パッケージ | DJI 対応 | KDDI スマートドローン
    - KDDI SmartDrone separates aerial connectivity from management-system eligibility, including an ANAFI Ai restriction, and qualifies its area information. ([kddi.smartdrone.co.jp](https://kddi.smartdrone.co.jp/communication/4g-lte/))
    - Evidence informing base-year company-share estimates: The current aerial package lists JPY xx.xx annually excluding tax and separates connectivity, management and adjacent package obligations. The tariff is a current comparable; historical realization, attachment and deductions remain modeled.
14. Unleashing the Power of Swappable Radio Modules (SRM): The Future of Connectivity Is Here.
    - The configured controller and radio relationship supports an integration-based account route with configuration-specific conditions. ([uxvtechnologies.com](https://www.uxvtechnologies.com/news/unleashing-the-power-of-swappable-radio-modules-srm-the-future-of-connectivity-is-here))
15. Telemetry Radios - Holybro
    - The catalog provides another named purchasing route involving Microhard products. ([holybro.com](https://holybro.com/collections/telemetry-radios))
16. UAS Radios: Wi-Fi, Microhard, Doodle Labs, LTE | ModalAI
    - The listed Microhard products establish a platform-related purchasing route, not portfolio-wide compatibility or independent originating radio technology. ([modalai.com](https://www.modalai.com/pages/radios))
17. LTE Aerial Use Plan | NTT DOCOMO
    - NTT DOCOMO presents a dedicated aerial LTE plan with compatible-equipment conditions and domestic-use scope. No tariff values are used. ([docomo.ne.jp](https://www.docomo.ne.jp/charge/lte-joukuriyou-plan/))
18. Vodafone Germany Launches Platform for Commercial Drones
    - The German carrier-platform relationship establishes a regional account proposition, not Global service fulfillment. ([vodafone.com](https://www.vodafone.com/news/newsroom/technology/vodafone-germany-launches-platform-for-commercial-drones))
19. CNPC-1000 UAS Command and Control Data Link | Collins Aerospace
    - Collins Aerospace's CNPC-xx.xx page publishes a notice prohibiting sale or lease until FCC authorization is obtained. The page alone does not independently settle subsequent authorization status. ([rtx.com](https://www.rtx.com/collinsaerospace/what-we-do/industries/military-and-defense/communications/tactical-data-links/cnpc-xx.xx-uas-command-and-control-data-link))
20. Elsight Limited - Appendix 4E and Annual Report 2025
    - Evidence informing base-year company-share estimates: Audited 2025 revenue separates USD xx.xx goods, USD xx.xx data usage and USD xx.xx other services. Comparative amounts support the recurring-dollar and revenue-mix test; Aura disclosures require scope qualification. Capture factors remain modeled.
21. Xmobots Aeroespacial e Defesa Ltda. - Demonstrações financeiras em 31 de dezembro de 2025
    - Evidence informing base-year company-share estimates: Note xx.xx separates BRL xx.xx product sales, BRL xx.xx merchandise resale and BRL xx.xx services, with returns and sales-tax deductions. These anchor the manufacturing-only attribution model, not a disclosed communications subtotal.
22. Brazilian Reals to U.S. Dollar Spot Exchange Rate (AEXBZUS)
    - Evidence informing base-year company-share estimates: The official 2025 annual average is BRL xx.xx per USD. It replaces the draft's assumed USD xx.xx per BRL without changing the local-currency activity and content assumptions.

23. NAURU 500C ISR - Xmobots

- Evidence informing base-year company-share estimates: The Nauru commercial portfolio identifies associated ground data terminals, supporting separation of included communications from the wider aircraft and control-station offering. It does not establish annual units, realized link prices or the modeled own-content fraction.

24. Batcomms OÜ - 2025 Annual Report

- Evidence informing base-year company-share estimates: The statutory report records EUR xx.xx customer sales and separate EUR xx.xx other operating income for March xx.xx-December xx.xx 2025. Sales are classified as R&D, requiring an explicit delivered-commercial-communications assumption rather than automatic eligibility.

25. BC-COMMS - BATCOMMS

- Evidence informing base-year company-share estimates: The BC-COMMS commercial offering addresses UAV, UGV and sensor-network applications, supporting a scope deduction within the narrow customer-development receipt model. It does not observe the assumed xx.xx% aircraft attribution.

26. U.S. Dollars to Euro Spot Exchange Rate (AEXUSEU)

- Evidence informing base-year company-share estimates: The official 2025 annual average is USD xx.xx per EUR, converting modeled eligible receipts of EUR xx.xx to USD xx.xx. It replaces the draft's rounded conversion parameter.

- Evidence informing base-year company-share estimates: The official 2025 annual average of USD xx.xx per EUR converts the modeled EUR xx.xx communications numerator to USD xx.xx. ([fred.stlouisfed.org](https://fred.stlouisfed.org/series/AEXUSEU))

- Evidence informing base-year company-share estimates: The 2025 annual rate is USD xx.xx per EUR, used to convert the modeled EUR xx.xx numerator.

- Evidence informing base-year company-share estimates: The 2025 annual rate is USD xx.xx per EUR, used for the revenue-calibrated communications numerator.

27. ドローン購入・機体選定サポート - KDDI スマートドローン株式会社

- Evidence informing base-year company-share estimates: The current aircraft-purchasing page reports experience with more than xx.xx customer companies. This constrains a modeled customer reference pool, not historical aerial-connectivity subscriptions or annual billing equivalents.

28. LTE 上空利用プランのご案内 - NTT DOCOMO

- Evidence informing base-year company-share estimates: The aerial-use tariff publishes a JPY xx.xx tax-exclusive monthly base charge. Twelve months supply the JPY xx.xx peer-calibrated network-input deduction; this is not an observation of KDDI's wholesale cost.

29. Japanese Yen to U.S. Dollar Spot Exchange Rate (AEXJPUS)

- Evidence informing base-year company-share estimates: The official 2025 annual average is JPY xx.xx per USD. It converts the modeled JPY xx.xx incremental-package numerator, replacing the draft's assumed JPY xx.xx per USD.

30. Motorola Solutions - Morgan Stanley Technology, Media & Telecom Conference Transcript, March 2, 2026

- Evidence informing base-year company-share estimates: The company CFO reported Silvus calendar-2025 revenue of USD xx.xx and identified drone applications. This anchors total-business revenue, not the modeled xx.xx% airborne attribution or equipment/service split. ([motorolasolutions.com](https://www.motorolasolutions.com/content/dam/msi/investors/doc_events/2026/final_transcript_msi_at_morgan_stanley_tmt_conference_03-xx.xx-xx.xx.pdf))

31. Motorola Solutions, Inc. Form 8-K - Silvus Acquisition Completion

- Evidence informing base-year company-share estimates: The mandatory filing records completion of the Silvus acquisition on August xx.xx 2025. It supports ownership and entity continuity, not a new revenue numerator or transferred product-specific warranties. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/d88358d8k.htm))

32. Mobilicom Reports 2025 Year-End Financial Results - SEC Exhibit 99.1
· Evidence informing base-year company-share estimates: The filed financial table reports USD xx.xx of 2025 revenue; operating disclosures identify continuing SkyHopper drone-production orders. These anchor the modeled numerator before the assumed xx.xx% scope deduction. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ea028293501ex99-xx.xx.htm))
33. ASSURE A83 - 2025 Annual Report
· Evidence informing base-year company-share estimates: The January-November 2025 academic detection dataset identifies manufacturer information for xx.xx platforms, including xx.xx DJI platforms. These counts calibrate a restricted installed/activity proxy; they are not global shipments or an observed revenue share.
34. DJI Launches O4 Air Unit Series to Deliver Unmatched First-Person View Flight Experience
· Evidence informing base-year company-share estimates: DJI's January xx.xx 2025 announcement lists O4 Air Unit prices of USD xx.xx and USD xx.xx. These constrain endpoint valuation comparables, subject to camera, controller-function and channel deductions; they do not establish annual units or realized OEM receipts.
35. DJI Demonstrates Drone Technology's Potential To Unlock U.S. Job Growth Across Agriculture Industry
· Evidence informing base-year company-share estimates: DJI's April 2025 company article states that cumulative agricultural-drone sales exceeded xx.xx units by October 2024. This constrains the modeled opening pool but is not an exact January 2025 active-fleet observation.
36. DJI Agriculture Reveals Global Adoption of Agricultural Drones Cuts 51Mt in Carbon Emissions and Saves 410Mts of Water for Farmers Globally
· Evidence informing base-year company-share estimates: DJI's April xx.xx 2026 announcement reports more than xx.xx DJI agricultural drones in use globally at end-2025. The observation constrains deployment scale; annual purchases require an explicitly modeled opening pool and retirements.
37. DJI O4 Air Unit Series - FAQ
· Evidence informing base-year company-share estimates: The official O4 FAQ distinguishes supported goggles, limited accessory reuse and conditional third-party controller compatibility. These support endpoint and replacement-boundary adjustments, not a numerical switching premium or global shipment weight.
38. Sky-Drones company post - Over 5000 Worldwide Users Trust Sky-Drones
· Evidence informing base-year company-share estimates: Company-issued disclosure of more than xx.xx worldwide users supplies the rounded reference pool for the assumption-led customer-activity model; it does not establish paying hardware accounts or annual shipments. ([linkedin.com](https://www.linkedin.com/posts/sky-drones_defense-security-inspections-activity-xx.xx-EU1j))
39. AIRLink - Sky-Drones Technologies Ltd
· Evidence informing base-year company-share estimates: AIRLink combines communications with autopilot and mission-computing functions, supporting communications-only attribution. Its stated monthly commercial supply capability is a feasibility ceiling, not observed calendar-2025 shipments. ([sky-drones.com](https://sky-drones.com/airlink))
40. SmartLink Ground Module - Sky-Drones Technologies Ltd
· Evidence informing base-year company-share estimates: The retrieved SmartLink Ground Module listing provides a current USD xx.xx endpoint price anchor. The xx.xx% net realization adjustment and historical price bridge are modeled, not disclosed. ([sky-drones.com](https://sky-drones.com/telemetry/smartlink-ground-module.html))
41. AIRLink Enterprise Set - Sky-Drones Technologies Ltd
· Evidence informing base-year company-share estimates: The current USD xx.xx AIRLink Enterprise Set price is a broader-package comparable. It supports excluding unrelated avionics and camera value rather than treating the complete set price as communications revenue. ([sky-drones.com](https://sky-drones.com/sets/airlink-enterprise-set.html))
42. Codan FY2025 Results - ASX Announcement, August 21, 2025
· Evidence informing base-year company-share estimates: Approximately AUD xx.xx of FY2025 DTC unmanned-systems revenue supplies the fiscal-year anchor for the calendar-2025 bridge; it is not wholly drone-attributable revenue. ([codan.com.au](https://codan.com.au/wp-content/uploads/2025/xx.xx/ASX-FY25-announcement_Aug-Board_FINAL-xx.xx.xx.xx.pdf))

43. Codan H1 FY2026 Investor Presentation
    · Evidence informing base-year company-share estimates: DTC's July-December 2025 unmanned revenue of approximately AUD xx.xx, up xx.xx%, supplies the second-half input and permits inference of the comparable 2024 half-year. The approximately balanced conflict/non-conflict mix does not disclose airborne attribution. ([codan.com.au](https://codan.com.au/cda-h1-fy26-investor-presentation/))
44. U.S. Dollars to Australian Dollar Spot Exchange Rate - Annual Series AEXUSAL
    · Evidence informing base-year company-share estimates: The official 2025 annual exchange rate of USD xx.xx per AUD converts DTC's calendar-bridged revenue to the frozen USD measurement basis. ([fred.stlouisfed.org](https://fred.stlouisfed.org/series/AEXUSAL))
45. UAV Data Link and Unmanned Communications - DTC, a Codan Company
    · Evidence informing base-year company-share estimates: The official unmanned communications offering supports the relevant business boundary; it does not quantify the assumed xx.xx% airborne share of disclosed unmanned revenue. ([dtccodan.com](https://www.dtccodan.com/solutions/unmanned/))
46. Embention reports record results in 2025 with €13.4 million in revenue and €6.6 million in EBITDA
    · Evidence informing base-year company-share estimates: Reported EUR xx.xx of 2025 company revenue provides a ceiling check for the communications-only customer-cohort estimate, not an automatic market-share numerator. ([embention.com](https://www.embention.com/news/embention-reports-record-results-in-2025-with-e13-xx.xx-million-in-revenue-and-e6-xx.xx-million-in-ebitda/))
47. Investor Relations - Embention
    · Evidence informing base-year company-share estimates: The investor page's 2025 metrics identify more than xx.xx worldwide clients, providing the rounded customer-pool input. Annual radio-buying incidence and quantities remain assumptions. ([embention.com](https://www.embention.com/investors/))
48. Datalink SDL for Wireless Communications - Embention
    · Evidence informing base-year company-share estimates: The SDL portfolio identifies SDL09 as a rugged P900 product, supporting attribution to Embention's incremental package contribution rather than gross originating-modem turnover. No sales quantities or net incremental prices are disclosed. ([embention.com](https://www.embention.com/veronte-ecosystem/avionics/sdl-los-datalink/))
49. P900 OEM Wireless Modem - Microhard
    · Evidence informing base-year company-share estimates: Microhard's originating P900 catalog corroborates the radio-origin boundary used to exclude incorporated modem value from Embention's modeled contribution; it does not establish wholesale transfer prices. ([microhardcorp.com](https://www.microhardcorp.com/P900.php))
50. The Importance of a Robust Data Link in UAV Operations - Embention
    · Evidence informing base-year company-share estimates: Embention's dated disclosure of its DTC collaboration supports retaining originating DTC radio value at DTC rather than counting the same underlying radio again in downstream integration. ([embention.com](https://www.embention.com/news/the-importance-of-a-robust-data-link-in-uav-operations/))
    · Evidence informing base-year company-share estimates: The disclosed DTC collaboration establishes an incorporated-radio and integration role. It supports the net-value boundary, not the assumed customer activity or incremental service fee. ([embention.com](https://www.embention.com/news/the-importance-of-a-robust-data-link-in-uav-operations/))
51. Radionor Communications AS Reports Record Earnings in 2025 Financial Result
    · Evidence informing base-year company-share estimates: Radionor reports rounded 2025 revenue of USD xx.xx and prior-year revenue of USD xx.xx. These anchor the aggregate-revenue and incremental-revenue model, not an observed UAV-only numerator or market share.
52. Radionor Communications opens branch in Ukraine - Ministry of Defence of Ukraine
    · Evidence informing base-year company-share estimates: The July xx.xx 2025 government account identifies UAV communications as a particular focus of Radionor's Ukrainian cooperation. This supports the direction of differentiated incremental UAV attribution, but does not quantify the assumed allocation.

53. Unmanned - Radionor Communications
    - Evidence informing base-year company-share estimates: The unmanned portfolio identifies UAV-facing radios and associated endpoint offerings, supporting the commercial-category bridge and separation from non-UAV applications. It does not establish sales volumes.
54. About CADDX
    - Evidence informing base-year company-share estimates: The current official page reports more than xx.xx distributor partners and identifies proprietary FPV transmission products and an official-store route. The model uses xx.xx as a footprint anchor with explicit historical, activity and channel-tier adjustments; it does not use the broader user count as annual shipments.
55. Walksnail Avatar HD VTX V2 Module - CADDXFPV
    - Evidence informing base-year company-share estimates: The camera-free Walksnail Avatar HD VTX V2 Module is listed at USD xx.xx. This current retail comparable anchors modeled transmitter realization after a stated indirect-channel adjustment; it is not an observed 2025 realized selling price.
56. Walksnail Avatar FPV VRX - CADDXFPV
    - Evidence informing base-year company-share estimates: The receiver listing establishes a separable ground communications endpoint and offers standalone and bundled purchasing choices. Its displayed USD xx.xx bundle price is not treated as the standalone receiver ASP; the model's USD xx.xx net receiver contribution remains an explicit assumption.
57. Viasat Annual Report 2026
    - Evidence informing base-year company-share estimates: The audited comparative segment table reports FY2025 tactical-networking product revenue of USD xx.xx. The report identifies TrellisWare as a majority-owned consolidated subsidiary and includes its activity within tactical networking; the line is a proxy, not TrellisWare-only or UAV-only revenue.
58. Viasat, Inc. Form 10-Q - Quarter Ended December 31, 2025
    - Evidence informing base-year company-share estimates: The tactical-networking product table reports April-December revenue of USD xx.xx in 2025 and USD xx.xx in 2024. Combined with FY2025 revenue, these inputs produce the USD xx.xx calendar-2025 business-line proxy.
59. TrellisWare Releases Latest Software with Support for Multiple Waveforms
    - Evidence informing base-year company-share estimates: The April xx.xx 2024 announcement identifies TW-xx.xx and TW-xx.xx embedded modules with small-UAS integration applicability and separately licensed software capability. This establishes a pre-2025 eligible portfolio and supports rejecting a pre-entry-zero inference.
60. TrellisWare Launches TW-310 Embedded Datalink Module For UAS Market
    - Evidence informing base-year company-share estimates: The TW-xx.xx launch is dated May xx.xx 2026. Its chronology prevents attributing that new offering's launch-driven sales to 2025 while leaving earlier eligible module activity in the modeled numerator.
61. MicroPilot - Professional UAV Autopilots and Client Base
    - Evidence informing base-year company-share estimates: The retrieved company page reports over 2,000 clients. This current cumulative business-scale observation constrains, but does not directly establish, the modeled xx.xx-customer-equivalent 2025 pool or annual ordering incidence.
62. MP2128LRC2 - MicroPilot Integrated UAV Autopilots
    - Evidence informing base-year company-share estimates: The MP2128LRC2 offering identifies integrated airborne/ground communications and off-the-shelf radio modems. This supports estimating only proprietary interface and incremental integration value rather than counting incorporated modem revenue again.
63. Potential of Unmanned Aerial Vehicles in the Grains Industry - Ben Boughton, Nuffield Australia, 2014
    - Evidence informing base-year company-share estimates: The 2014 noncommercial report identifies a USD xx.xx MicroPilot ground-control software price and distinguishes software from the radio connection. It is a historical comparable, not an observed 2025 realized price or communications-only allocation.
64. AeroVironment, Inc. Form 10-K - Fiscal Year Ended April 30, 2026
    - Evidence informing base-year company-share estimates: The annual-filing revenue table reports fiscal-2025 Uncrewed Aircraft Systems revenue of USD xx.xx and Precision Strike and Defense Systems revenue of USD xx.xx. These are fiscal-period bridge inputs, not drone-data-link revenue.

65. AeroVironment, Inc. Form 10-Q/A - Quarter Ended January 31, 2026, Filed June 22, 2026
· Evidence informing base-year company-share estimates: The amended quarterly filing supplies UAS and Precision Strike revenue for the nine-month and quarterly periods ending January 2026 and January 2025. Those inputs support the calendar-period bridge and expose the acquired-business scope adjustment; revenue was unaffected by the restatement.
66. AeroVironment DDL Digital Data Link - 2015 Product Datasheet
· Evidence informing base-year company-share estimates: The historical 2015 DDL datasheet identifies separately supplied AeroVironment communications modules and transceivers. It supports a communications-only originating-product boundary, not 2025 shipments or current merchant availability.
67. GA-ASI Selected To Support U.S. Navy CCA Design Effort - October 17, 2025
· Evidence informing base-year company-share estimates: The October xx.xx 2025 company announcement reports more than xx.xx aircraft built annually and more than xx.xx cumulative deliveries. These constrain the annual installation and retained-support-pool model; neither is a directly observed 2025 communications numerator.
68. GA-ASI Demonstrates Predator-System Interoperability With NATO ISR Enterprise at Unified Vision 2014
· Evidence informing base-year company-share estimates: The historical interoperability announcement identifies L-xx.xx communications equipment separately from GA-ASI networking, ground-station and integration contributions. It supports deducting third-party radio value and unrelated sensor-processing functions.
69. GA-ASI, Lockheed Martin and L3Harris Collaborate on Crewed-Uncrewed Teaming Flight Test - November 17, 2025
· Evidence informing base-year company-share estimates: The November xx.xx 2025 announcement identifies L3Harris radios in the October demonstration and states that the demonstration series used internal R&D funding. This supports excluding outside radio value and not treating the demonstration as a paid commercial delivery.
70. Hoverfly Spectre Officially Added to DIU Blue List, Cementing NDAA Compliance
· Evidence informing base-year company-share estimates: The company-issued February xx.xx 2025 release reports hundreds of systems delivered to defense customers. This anchors cumulative commercial activity, not observed annual shipments or the returned share.
71. Spectre - Hoverfly Technologies
· Evidence informing base-year company-share estimates: Spectre documentation identifies tether-carried command/control and separately named radio payloads. It supports communications-only attribution and exclusion of lifted merchant radios, not the assumed realized value.
72. Leonardo DRS, Inc. - 2025 Form 10-K
· Evidence informing base-year company-share estimates: The 2025 filing establishes an approximately xx.xx% minority interest in Hoverfly. It supports ownership-boundary treatment; investment value is not used as operating revenue and the working share receives no minority-ownership haircut.
73. Ondas Inc. - Form 10-K for the Year Ended December 31, 2025
· Evidence informing base-year company-share estimates: The filing reports USD xx.xx OAS revenue and rounded acquired-business contributions used to derive an approximately USD xx.xx core aerial-platform proxy. It also reports USD xx.xx Networks revenue and distinguishes aerial, ground-robotics, sensing and counter-UAS businesses. Communications content and package-equivalent prices remain modeled.
74. US tech helps Australian drone capabilities hit new high - Austrade
· Evidence informing base-year company-share estimates: The June xx.xx 2025 government-hosted company interview reports production exceeding xx.xx drones monthly. It anchors the modeled annual throughput; full-year deliveries and communications realization remain assumed. ([international.austrade.gov.au](https://international.austrade.gov.au/en/news-and-analysis/success-stories/us-tech-helps-australian-drone-capabilities-hit-new-high))

75. Skydio Extends its Modular, Open Platform to Support Custom Attachments for X10D
    · Evidence informing base-year company-share estimates: The March xx.xx 2025 release reports over xx.xx commercial/public organizations and prior full-rate X10D deliveries. The organization count constrains the modeled service pool but does not measure paid communications subscriptions. ([skydio.com](https://www.skydio.com/blog/skydio-extends-its-modular-open-platform-to-support-custom-attachments-for-x10d))
76. Skydio Delivers the First Systems for Tranche 2 of the U.S. Army's Short Range Reconnaissance Program
    · Evidence informing base-year company-share estimates: The May xx.xx 2025 release reports a fulfilled Army order and shipment of the xx.xx,000th drone. Cumulative milestones are corroborating scale observations, not an exact annual shipment difference. ([skydio.com](https://www.skydio.com/blog/skydio-delivers-first-systems-for-army-srr-t2))
77. Skydio Announces Upgraded Suite of Wireless and Connectivity Capabilities
    · Evidence informing base-year company-share estimates: The release distinguishes aircraft-related radio, cellular and fused connectivity offerings. It supports isolating communications from complete aircraft value, without establishing modeled prices or paid attachment rates. ([skydio.com](https://www.skydio.com/blog/skydio-announces-upgraded-suite-of-wireless-and-connectivity-capabilities))
78. U.S. Dollars to U.K. Pound Sterling Spot Exchange Rate (AEXUSUK)
    · Evidence informing base-year company-share estimates: The 2025 annual rate is USD xx.xx per GBP, used to convert the modeled GBP xx.xx incremental-value numerator.
79. eXtended Long Range System - Professional Long Range Radio Control Systems
    · Evidence informing base-year company-share estimates: The inspected manufacturer business presentation advertises xx.xx-plus units annually. This is an undated aggregate commercial-activity indicator, not observed 2025 shipments; period, UAV and endpoint adjustments are modeled.
80. Digital Micro Devices - Price List XLRS Systems, 20 January 2021
    · Evidence informing base-year company-share estimates: The January xx.xx 2021 manufacturer list gives communications-package ranges of EUR xx.xx-xx.xx and EUR xx.xx-xx.xx. These constrain the assumed EUR xx.xx historical reference; they do not establish 2025 realized prices.
81. DMD presentation
    · Evidence informing base-year company-share estimates: The dated January xx.xx 2024 CEO presentation identifies UAV, ground, surface, robotics and industrial applications, requiring a modeled UAV deduction rather than treating all activity as drone communications.
82. Goran S. - Orqa 2025 revenue disclosure
    · Evidence informing base-year company-share estimates: The company's CFO reports rounded 2025 revenue of EUR xx.xx and distinguishes it from an anticipated higher consolidated figure. This supplies the basket-calibration ceiling, not a directly observed communications numerator.
83. rapidFIRE 5.8Ghz Video Receiver
    · Evidence informing base-year company-share estimates: The inspected official shop lists the rapidFIRE video receiver at EUR xx.xx. Its separable communications function and current price constrain the modeled net module realization, without proving annual unit volume.
84. FPV Controller - Best Remote Drone Radio Transmitter - Orqa
    · Evidence informing base-year company-share estimates: The official FPV.Ctrl offering establishes a separately marketed control-link endpoint, supporting separation of originating communications from complete aircraft, headset displays and unrelated electronics.
85. Elistair | About us
    · Evidence informing base-year company-share estimates: The company timeline records crossing xx.xx products sold in 2022. This historical installed-pool scale anchors the modeled legacy purchasing and support components, not an observed 2025 flow.
86. Elistair Awarded €3 Million Contract for Small Tethered UAS by Allied Military Force
    · Evidence informing base-year company-share estimates: The February 2025 announcement states a EUR xx.xx small tethered-UAS contract including spares, training and support, with deliveries scheduled from Q2 2025. Recognition and communications-only content remain assumptions.

87. Elistair Equips Greece with 13 Tethered Drones to Fight Wildfires
- Evidence informing base-year company-share estimates: The May xx.xx 2025 announcement identifies an award for xx.xx tethered surveillance drones for Greek fire-service mobile operations centers. It provides a unit anchor, not confirmed 2025 recognized revenue.

88. Support - Elistair | Tethered Drone Company
- Evidence informing base-year company-share estimates: Elistair explains that wired-data capability depends on the aircraft and that some manufacturers retain wireless data. This supports a deduction for power-only tether purchases; it does not observe the modeled xx.xx% eligibility.

89. Solid State Annual Report 2025
- Evidence informing base-year company-share estimates: FY2025 Systems revenue is GBP xx.xx, with noncommunications activity reported at xx.xx%. Their complement supplies a derived GBP xx.xx communications input, subject to calendar and UAV adjustments.

90. Solid State plc - Final Results for the 12 months ended 31 March 2026
- Evidence informing base-year company-share estimates: FY2026 Systems revenue is GBP xx.xx, including GBP xx.xx communications-program revenue recognized in its first half, which falls within calendar 2025.
- Evidence informing base-year company-share estimates: The report identifies the Persistent Systems ecosystem and separately places the initial Project CAIN delivery after the captured base year, supporting exclusion of duplicated originating radios and later deliveries.

91. Unmanned Systems & Remotely-Operated Vehicles - Steatite Communications
- Evidence informing base-year company-share estimates: Steatite's official unmanned offering separates Wave Relay links from antennas, tracking and ground-system contributions. This supports an incremental-value model rather than attribution of all incorporated radio turnover.

92. DFS-Konzern Geschäftsbericht 2025
- Evidence informing base-year company-share estimates: The 2025 consolidated filing reports Droniq full-entity revenue of EUR xx.xx separately from ownership-attributed columns, supplying the correct company revenue anchor.
- Evidence informing base-year company-share estimates: The management report describes below-plan procurement and project delays, qualifying an automatic conversion of offering availability into paid activation.

93. HOD4stream Product Flyer
- Evidence informing base-year company-share estimates: The official HOD4stream brochure establishes a remote-control/video communications package with cellular access. It supports the dedicated-offering boundary, not annual sales or the assumed revenue mix.

94. Drohnen in Industrie - Sichtbar & automatisiert im Luftraum fliegen.
- Evidence informing base-year company-share estimates: The inspected official industrial-offerings page lists HOD4track from EUR xx.xx excluding VAT alongside whole aircraft, training and other services. The price is a current module-equivalent check, not observed 2025 realization or volume.

95. Press release: Frankfurt Fire Department relies on Droniq
- Evidence informing base-year company-share estimates: The November xx.xx 2025 customer announcement describes Droniq's aircraft sales, training, authorization support, mission services and UTM offering. These require exclusions rather than treating total revenue as data-link revenue.

96. The future of UAV connectivity: Gotonomi’s critical comms for autonomous UAV operations
- Evidence informing base-year company-share estimates: The original January xx.xx 2025 interview with Gotonomi's general manager reports more than xx.xx pre-production units delivered to the market and describes production deliveries beginning in February 2025. The model uses this company-operating statement as an engagement-scale anchor, not as audited paid shipments or 2025 revenue.

97. Gotonomi Completes Successful Flight Trials and Opens Orders
- Evidence informing base-year company-share estimates: The August xx.xx 2024 supplier announcement establishes production-order availability and separately identifies Gotonomi hardware, Videosoft licensing and Viasat airtime. It supports the model's exclusion of third-party software, connectivity and pure resale value, not its assumed 2025 unit flow or price.

98. Coalas Tech - Системи радіозв'язку для НРК
    - Evidence informing base-year company-share estimates: The company presentation states that more than xx.xx drones have been equipped and that activity began in 2024, supplying a cumulative commercial-activity reference rather than an annual sales count.
    - Evidence informing base-year company-share estimates: The presentation gives an entry paired-link price from USD xx.xx. The model separates aircraft receivers from reused ground equipment and applies explicit annualization, UAV-scope and net-realization assumptions.
99. Home - Coalas Tech: product listings and company activity
    - Evidence informing base-year company-share estimates: The retrieved manufacturer product listing gives UAH xx.xx for the basic coalas::45RX receiver. This is a current endpoint-price comparable, not an observed 2025 realized price; the model explicitly assumes the currency bridge and unchanged nominal historical comparable.
100. For investors and partners - UVS Dynamics
    - Evidence informing base-year company-share estimates: The company states that radio revenue begins with its first small series, whose date remained unpublished; disclosed grant and founders' financing are not market sales.
101. About - UVS Dynamics
    - Evidence informing base-year company-share estimates: The radio programme began in November 2025; the September 2026 status distinguishes current company development from earlier products worked on by team members, addressing predecessor attribution.
102. LAT Defence - European fibre-optic UAV components & manufacturing
    - Evidence informing base-year company-share estimates: The company's dated 2026 presentation identifies its new entity, 2026 product supply and a line still being commissioned; partner competencies are distinguished from this company's operating receipts.
103. Jauns aizsardzības uzņēmums «LAT Defence» ražos dronu tehnoloģijas un apmācīs to pilotus - LSM
    - Evidence informing base-year company-share estimates: July xx.xx 2026 reporting corroborates the new venture and its initial product-development and supply agreement, supporting the operating-entry date rather than a founding-date-only zero.
104. Lietuviški husarai danguje: šalyje įsisuka dronų pramonė - LRT
    - Evidence informing base-year company-share estimates: The February xx.xx 2025 commercial interview reports more than xx.xx aircraft dispatched and approximately xx.xx aircraft per month of capacity; these constrain the modeled flow but do not establish annual sales or link revenue.
105. Advanced UAV Defence Solutions - Baltic Viper
    - Evidence informing base-year company-share estimates: The official commercial portfolio identifies communications-bearing aircraft and relay offerings, supporting the activity boundary but not shipment counts or promotional performance claims.
106. WB Electronics S.A. - 2025 Management Report, including sustainability reporting
    - Evidence informing base-year company-share estimates: The 2025 report supplies the PLN xx.xx net-revenue table and xx.xx% aerospace taxonomy-turnover classification used as an explicitly qualified business-scope proxy, not direct drone-link sales.
107. Setki WARMATE dla Wojska Polskiego - GRUPA WB
    - Evidence informing base-year company-share estimates: The December xx.xx 2025 announcement identifies xx.xx WARMATE sets containing xx.xx aircraft scheduled for delivery by year-end; scheduled deliveries are not assumed to be recognized revenue.
108. Kolejne Warmate dla Wojska Polskiego - Defence24
    - Evidence informing base-year company-share estimates: Dated reporting corroborates the approximately PLN xx.xx gross, xx.xx-aircraft contract event; it calibrates package-price scale rather than directly observing communications revenue.
109. Thousandth FlyEye produced - WB GROUP
    - Evidence informing base-year company-share estimates: The March xx.xx 2024 announcement identifies the thousandth FlyEye produced. This cumulative milestone constrains the modeled installed support pool; it is not a 2025 shipment count.

110. Portuguesa Beyond Vision conquista contrato de drones nos EUA - Portugal Global
    - Evidence informing base-year company-share estimates: The commercial announcement reports EUR xx.xx of 2024 turnover and a EUR xx.xx, xx.xx-package order, with deliveries beginning in 2026. It supports the economic-package price proxy and excludes this order from assumed 2025 delivery revenue.
111. Citymesh first responder drone activated at DronePort, the first DiaB installed on an active airport
    - Evidence informing base-year company-share estimates: The April xx.xx 2025 customer disclosure identifies approximately xx.xx installed drone-in-a-box units and further deployments underway, constraining installed stock rather than supplier annual receipts.
112. Minister Francken visits the new Citymesh Remote Operations Center at DronePort Sint-Truiden
    - Evidence informing base-year company-share estimates: The September 2025 customer disclosure identifies a network of xx.xx drone-in-a-box units, independently constraining the modeled Belgian deployment progression.
113. Citymesh demonstrates Safety Drones from the new R.O.C. in DronePort Sint-Truiden
    - Evidence informing base-year company-share estimates: The October xx.xx 2025 customer statement distinguishes more than xx.xx installed units from a xx.xx-unit year-end target; the model does not treat the target as completed sales.
114. Taking industries further with the enhanced Nokia Drone Networks platform
    - Evidence informing base-year company-share estimates: Nokia's November xx.xx 2025 update identifies Belgian, Spanish and U.S. commercial activity while describing Switzerland as planning deployment. It supports geographical participation and offering-generation separation, not the assumed international unit counts.
115. Nokia and Swisscom Broadcast to deploy largest Drones-as-a-Service network
    - Evidence informing base-year company-share estimates: The August xx.xx 2024 announcement identifies a planned xx.xx-unit Swiss network. This is a programme-scale constraint, not an observation of xx.xx units delivered or recognized in 2025.
116. The DOT-Chain Defence drone catalog: UAVs from 20 manufacturers are now available to the military
    - Evidence informing base-year company-share estimates: The August xx.xx 2025 government announcement identifies Reactive Drones among newly contracted DOT-Chain Defence manufacturers. It supports base-year commercial access, not company-specific shipment value; marketplace totals are not allocated to the company.
117. Ударний БПЛА Кажан | ТОВ Реактивні Дрони
    - Evidence informing base-year company-share estimates: The current manufacturer page states up to xx.xx UAVs monthly and xx.xx annually. The model uses the lower monthly-annualized xx.xx commercial capacity reference, with separate assumed 2025 capacity and utilization bridges; these are not observed 2025 deliveries.
118. Reactive Drone Ukraine | Manufacturer of unmanned aerial systems
    - Evidence informing base-year company-share estimates: Reactive Drone describes its aircraft manufacturing and proprietary communications activity. This supports evaluating attributable captive communications, but does not verify the modeled USD xx.xx own-origin value per delivery or purchased-component deduction.
119. RedFish LongTerm Capital - Relazione Finanziaria al 31 Dicembre 2025
    - Evidence informing base-year company-share estimates: The Alpi Aviation operating review reports approximately EUR xx.xx of 2025 revenue and delivery of the first three systems under the DAA contract. Three deliveries anchor the incremental communications-fee model; whole-aircraft revenue is not the numerator.
    - Evidence informing base-year company-share estimates: The review identifies VTOL retrofit and certification activity, supporting exclusion of those adjacent functions unless separately attributable to communications.
120. Milestones - CTech
    - Evidence informing base-year company-share estimates: CTech's chronology identifies SkyARX's ANKA integration in 2019 and xx.xx cumulative flight hours on ANKA and AKSUNGUR in its 2024 milestone sequence. This reported aggregate activity anchors an assumption-led equipped-aircraft-equivalent proxy, not an observed installed-unit count.

121. MSI, May 2025 - Interview with CTech General Manager Dr. Cüneyd Fırat
· Evidence informing base-year company-share estimates: The company-hosted May 2025 management interview describes SkyARX use on ANKA and AKSUNGUR and an expected annual business scale of USD xx.xx-xx.xx. The latter is a prospective scale check, not realized 2025 revenue or a UAV revenue split.
122. SkyARX - CTech
· Evidence informing base-year company-share estimates: The official SkyARX page establishes a terminal-side unmanned-aircraft communications offering. It supports excluding originating network airtime and complete-aircraft value; it does not publish the modeled supplier-equivalent price.
123. Baykar Remains Global UCAV Export Leader in 2025
· Evidence informing base-year company-share estimates: Baykar's January xx.xx 2026 announcement reports USD xx.xx of total revenue and USD xx.xx of exports for calendar 2025. Total revenue anchors the package-equivalent model; no company promotional leadership claim is used as market-share evidence.
124. Baykar Technology - Avionics/Subsystems
· Evidence informing base-year company-share estimates: Baykar's official avionics catalog identifies digital communications and video-link subsystems, supporting a captive originating communications model. It does not establish the assumed USD xx.xx communications content or its own-versus-purchased split.
125. Creomagic to Provide Thousands of Datalink Systems to an International UAS Manufacturer
· Evidence informing base-year company-share estimates: The company announcement reproduced in specialist press describes an airborne-unit and ground-station order exceeding USD xx.xx. It supports the reference lot value used in the model, not observed 2025 annual revenue or its assumed delivery cadence.
126. Products - Creomagic
· Evidence informing base-year company-share estimates: The originating manufacturer's catalog distinguishes UAV-facing airborne radios from land, maritime and personal products. This supports the modeled numerator's product boundary, but does not provide sales quantities.
127. Rafael Places US$5.5 Million Order for Orbit's Airborne Satcom and Ground Pedestal Solutions for Heron TP UAV
· Evidence informing base-year company-share estimates: Orbit's company-issued announcement schedules a USD xx.xx UAV communications order across 2019 and 2020. It supplies a two-calendar-year procurement comparable for Creomagic's assumed annualization, not evidence of Creomagic's actual schedule.
128. Gilat Satellite Networks Ltd. - Form 6-K, April 9, 2025
· Evidence informing base-year company-share estimates: The April xx.xx 2025 Form xx.xx-K contains the announcement of a contract exceeding USD xx.xx from a UAV company for DKET terminals, with deliveries scheduled later in 2025. The model uses the disclosed threshold and assumed recognition and dedicated-drone attribution; neither annual recognition nor the final share is directly observed.
129. Gilat Reports Fourth Quarter and Full Year 2025 Results
· Evidence informing base-year company-share estimates: Gilat reports USD xx.xx of total 2025 revenue across broader businesses. This is a reporting-boundary and scale check, expressly not the drone numerator or an automatic market-share weight.
130. Connectivity for BLoS Missions - Defense Aviation - Gilat
· Evidence informing base-year company-share estimates: The official defense aviation portfolio identifies unmanned-aircraft SATCOM terminals. It supports eligible terminal-side commercial participation, while providing no additional attributable 2025 shipment or revenue quantity.
131. Milkor busy with Milkor 380 production and deliveries as UAV project enters a new phase - Milkor Company Zone, April 3, 2025
· Evidence informing base-year company-share estimates: Milkor's dated company-issued material reports annual UAV production of eight and six aircraft under construction in the preceding year. These constrain the modeled activity scale but do not establish accepted deliveries or recognized revenue. ([defenceweb.co.za](https://defenceweb.co.za/company-zones/milkor/PressRelease.php?StoryID=xx.xx))

132. Milkor Integrated Systems - MIS Digital Catalogue 2022

· Evidence informing base-year company-share estimates: The official catalog identifies communications equipment and communications-system services separately within Milkor's wider portfolio. It supports the own-value boundary, not the assumed unit values or 2025 sales. ([milkor.com](https://milkor.com/wp-content/uploads/2022/xx.xx/MIS-Digital-Catalogue-2022_compressed.pdf))

133. Armscor Annual Report 2024-2025 - procurement contract KT471248

· Evidence informing base-year company-share estimates: Armscor records Denel Dynamics' ZAR xx.xx Seeker xx.xx steady-state support contract, starting June xx.xx 2024 and expiring June xx.xx 2027. This is the procurement anchor for assumed annualized communications support; the full contract is not counted as drone-link revenue. ([armscor.co.za](https://www.armscor.co.za/wp-content/uploads/2025/xx.xx/2024-xx.xx-Armscor-Annual-Report_compressed.pdf))

134. Denel Group Annual Report 2024/2025

· Evidence informing base-year company-share estimates: Denel reports resumed fourth-RPV project execution and Seeker xx.xx maintenance-spares activity for a Middle Eastern customer. These identify additional eligible activity routes, but do not disclose calendar-2025 communications revenue, completion percentages or the modeled export amount. ([nationalgovernment.co.za](https://nationalgovernment.co.za/entity_annual/xx.xx/2025-denel-soc-ltd-annual-report.pdf))

135. Production & Quality Control | Shenzhen Yangda Technology Co., Ltd.

· Evidence informing base-year company-share estimates: The company states commercial capacity of xx.xx complete UAV-system integrations per month and separately xx.xx airframes per month. The model uses only the former as its integration-capacity anchor, with explicit 2025 carry-back and utilization assumptions; neither quantity is treated as observed 2025 shipments.

136. Leading Industrial UAV Manufacturer About Us | YANGDA

· Evidence informing base-year company-share estimates: The company states deployment across more than xx.xx projects and identifies UAV systems, video/data links and lifecycle services. The cumulative project statement constrains the modeled replacement pool but does not establish annual purchases or communications-only revenue.

137. YANGDA Technical Support Team Successfully Conducts 5-Day Training on Sky Whale VTOL Drone System in Kenya

· Evidence informing base-year company-share estimates: The February xx.xx 2025 announcement identifies a Sky Whale customer-support package incorporating Videopass-N60 and a ground-control station. This supports base-year commercial participation and the named package boundary, not the modeled annual quantity or sourcing percentage.

138. China Shenzhen Suntor Technology Co., Ltd. Company Profile

· Evidence informing base-year company-share estimates: The company profile states products, solutions and ODM services supplied to more than xx.xx customers. This is the cumulative commercial-scale input for the assumption-led purchasing model, not a dated active-customer or shipment observation.

· Evidence informing base-year company-share estimates: The profile identifies multiple non-UAV communications businesses, requiring an explicit airborne-scope adjustment. Its annual-sales field lacks the period and currency needed for a directly observed 2025 USD numerator and is excluded from calculation.

139. About Shenzhen Suntor Technology Company Introduction

· Evidence informing base-year company-share estimates: The official company introduction distinguishes airborne radios from handheld, shipboard, vehicle-mounted, base-station and dispatch offerings. It supports excluding non-drone applications rather than using total communications-business scale as automatic drone-link revenue.

140. WHO WE ARE - FrSky - Lets you set the limits

· Evidence informing base-year company-share estimates: FrSky's own profile reports RMB xx.xx annual sales in 2018. This is the historical company-specific scale anchor for an assumption-led 2025 bridge, not observed 2025 revenue.

· Evidence informing base-year company-share estimates: The identified transmitter, receiver, module, controller and sensor portfolio supports separating communications value from broader corporate receipts.

141. Best selling products - RadioMaster RC
- Evidence informing base-year company-share estimates: Manufacturer catalog comparables of USD xx.xx for TX16S Mark II, USD xx.xx for RP3 V2 and USD xx.xx for Nomad constrain the modeled handset, receiver and external-module basket.
- Evidence informing base-year company-share estimates: These are peer retail-price inputs only; FrSky's product mix, wholesale realization and handset communications allocation remain modeled assumptions.

142. Chinese Yuan Renminbi to U.S. Dollar Spot Exchange Rate (AEXCHUS) | FRED | St. Louis Fed
- Evidence informing base-year company-share estimates: The official annual exchange-rate series reports RMB xx.xx per USD for 2025, converting the assumed RMB business baseline into the frozen denominator's USD basis.
- Evidence informing base-year company-share estimates: The exchange rate does not validate the assumed 2025 business receipts or communications attribution.

143. Iridium Communications Inc. 2025 Annual Report
- Evidence informing base-year company-share estimates: The 2025 annual report provides broadband revenue of USD xx.xx and monthly ARPU of USD xx.xx and IoT revenue of USD xx.xx and monthly ARPU of USD xx.xx. These support subscriber-to-service-value calculations, not the assumed UAV subscriber counts.
- Evidence informing base-year company-share estimates: The disclosed government airtime contract is fixed-price and not subscriber- or usage-priced; its UAV allocation is therefore modeled rather than directly observed.
- Evidence informing base-year company-share estimates: Broadband revenue declined from USD xx.xx in 2024, qualifying an inference of universally rapid service adoption.

144. Autonomous Systems | Iridium
- Evidence informing base-year company-share estimates: Iridium's autonomous-systems page identifies aircraft connectivity and partner terminal routes, including ATMOSPHERE, Ground Control, NAL Technologies and SKYTRAC.
- Evidence informing base-year company-share estimates: Supports the network-service versus terminal-supplier boundary and deduplication premise. The current page does not independently establish 2025 UAV subscription quantities.
- Evidence informing base-year company-share estimates: The named PLANET xx.xx UAV-L partner product corroborates ATMOSPHERE's terminal-side role within the Iridium network relationship, without establishing annual shipments.

145. ATMOSPHERE
- Evidence informing base-year company-share estimates: ATMOSPHERE states that PLANET serves hundreds of users across aircraft, rotorcraft, UAV/USV and balloon applications and describes a team of more than ten engineers.
- Evidence informing base-year company-share estimates: This mixed installed-user scale anchors a specialist-business model. The 2025 population, UAV fraction, purchase incidence and realized values are assumptions, not disclosed observations.
- Evidence informing base-year company-share estimates: The page distinguishes terminal manufacturing, custom development, aviation, UAV and IoT activities, requiring an explicit UAV-only attribution.

146. ATMOSPHERE | Connect by CNES
- Evidence informing base-year company-share estimates: The CNES business profile identifies ATMOSPHERE's satellite/5G equipment, Iridium partnership, drone connectivity, software and cloud-service offerings.
- Evidence informing base-year company-share estimates: Corroborates the separable hardware, software and connectivity roles used in the numerator boundary, not their annual revenue amounts.

147. Terms and Conditions
- Evidence informing base-year company-share estimates: ATMOSPHERE's terms distinguish product purchase prices from monthly access, call and data charges.
- Evidence informing base-year company-share estimates: Supports separating equipment and continuing service obligations, and excluding originating-network pass-through from ATMOSPHERE's incremental service value. It does not establish the modeled fee amounts.

20.2. Market Concentration Analysis, 2025

[illegible] Multiple seller quotations consequently need not represent independent communications sources. Buyers seeking supply diversification should identify the originating radio, embedded management dependency and support owner, not merely compare the names on quotations.

[illegible] These relationships matter when evaluating group exposure, but do not make every group offering commercially identical. TrellisWare radio procurement and Viasat's Velaris service remain different deliverables and can involve different contractual counterparties.

[illegible] Buyers should specify renewal, reassignment, data access and support rights in the applicable agreement. Retaining direct management relationships can preserve control, whereas coordinated delivery reduces the number of relationships the buyer administers.

[illegible] This is a counterexample to treating all drone communications as a single closed category, not proof of unrestricted substitution. A buyer can retain meaningful choice in one communications function while remaining dependent on another supplier for video or management.

Network permission remains an upstream bargaining point even where terminal choice is broad. [illegible] Contracting flexibility is therefore greatest when the buyer has both qualified equipment alternatives and a usable network relationship; terminal diversity alone does not establish that combination.

Sources & Evidence

1. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
   · The combined connectivity-and-management offering supports treating management access as a separate continuing commercial relationship.
   ([elsight.com](https://www.elsight.com/products/halo-for-commercial-use/))

2. Motorola Solutions, Inc. Form 8-K reporting completion of the Silvus acquisition
   · Motorola Solutions' mandatory filing records completion of the Silvus acquisition on August xx.xx 2025, establishing common group ownership rather than product equivalence. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/d88358d8k.htm))
3. Statement: Spectrum for Unmanned Aircraft Systems (UAS)
   · Ofcom requires network-operator agreement for mobile and satellite technologies covered by its UAS framework, establishing a permission boundary distinct from terminal choice. ([ofcom.org.uk](https://www.ofcom.org.uk/spectrum/radio-equipment/spectrum-for-unmanned-aircraft-systems))
4. UAV Data Link and Unmanned Communications - DTC, a Codan Company
   · DTC identifies itself as a Codan business and markets unmanned-system communications, establishing an ownership context without product-equivalence claims. ([dtccodan.com](https://www.dtccodan.com/solutions/unmanned/))
5. Triad High Power Radio Systems For Unmanned Land Air Sea
   · Named incorporated radios demonstrate shared upstream dependencies across differently branded offers. ([triadrf.com](https://triadrf.com/radio-systems/))
6. Datalinks | UAV Navigation
   · A branded package incorporating Microhard supports the distinction between seller diversity and originating-component independence. ([uavnavigation.com](https://uavnavigation.com/products/peripherals/datalinks))
7. SkyLink - uAvionix
   · The stated functionality dependency establishes a management control point distinct from purchasing radio hardware. ([uavionix.com](https://uavionix.com/product/skylink/))
8. Viasat, Inc. Form 10-Q - Quarter Ended June 30, 2026
   · Viasat's Form xx.xx-Q for the quarter ended June xx.xx 2026 includes majority-owned TrellisWare in consolidated reporting, establishing the ownership relationship without combining operating contracts. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/vsat-xx.xx.htm))
9. DJI O4 Air Unit Series - FAQ - DJI
   · The goggle restriction establishes a video-specific installed dependency rather than a uniform constraint across every communications function. ([dji.com](https://www.dji.com/o4-air-unit/faq))
10. Unleashing the Power of Swappable Radio Modules (SRM): The Future of Connectivity Is Here.
    · Incorporation of named originating suppliers supports distinguishing module choice from independent upstream supply. ([uxvtechnologies.com](https://www.uxvtechnologies.com/news/unleashing-the-power-of-swappable-radio-modules-srm-the-future-of-connectivity-is-here))
11. Telemetry Radios - Holybro
    · Microhard-branded products in another seller's catalog illustrate why seller choice need not establish an independent originating source. ([holybro.com](https://holybro.com/collections/telemetry-radios))
12. UAS Radios: Wi-Fi, Microhard, Doodle Labs, LTE | ModalAI
    · ModalAI's catalog supports separating platform packaging from the incorporated modem supplier. ([modalai.com](https://www.modalai.com/pages/radios))
13. Autonomous Systems | Iridium
    · Partner-terminal alternatives support equipment choice within an originating network relationship, not independence from network service. ([iridium.com](https://www.iridium.com/markets/aviation/autonomous-systems))
14. Receivers - RadioMaster RC
    · The catalog provides a separately marketed control-link choice, not evidence of cross-brand video compatibility. ([radiomasterrc.com](https://www.radiomasterrc.com/collections/receivers))
15. Receivers - BETAFPV
    · The marketed control-link choice provides a counterexample to treating every included communications function as one supplier's closed ecosystem. ([betafpv.com](https://betafpv.com/collections/receivers))

16. Product Finder | ExpressLRS
    · Project-specific hardware support establishes documented control-link alternatives, not unrestricted substitution across products or communications functions.
    ([expresslrs.org](https://www.expresslrs.org/product-finder/))

20.3. Recent Developments & Impact Analysis, 2025

Ownership changes alter supplier diligence before they establish product integration. ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■ ■■ ■■■■■ ■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■ ■■■■■■■ ■■ ■■■■■■■■■■■ ■■ ■■■■■ ■■■ ■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■■■■ Acquisition completion does not establish transferred warranties, an integrated product roadmap or current HAWK merchant availability.

Nokia's July xx.xx 2026 financial report classified Enterprise Campus Edge as discontinued operations because reaching a sale agreement was considered highly probable. This describes an anticipated transaction, not a completed ownership transfer or product withdrawal. ■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■ ■■ ■■■■■■■■■■

Patria's February xx.xx 2025 SIRTAP agreement establishes aircraft-prime access for a CANDL-based airborne-and-ground datalink. ■■■ ■■■■ ■■■■■ ■■■■■■ ■■■■■■■■■ ■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■ ■■■■ ■■■■■ ■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■ ■■ ■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ Prime contractors should align the quoted generation and supplier milestones with their own commitments, with confirmation of delivery and acceptance acting as the trigger for dependent procurement decisions.

■■■ ■■■■■■ ■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■ ■■■■ ■■■■ ■ ■■■■■■■■ ■■■■■■■■ ■■■■■ ■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■ The managed route is preferable only when its contract accepts the buyer's required coordination and escalation duties. Ofcom's separate network-agreement requirement illustrates why the new delivery layer cannot be treated as independent permission to operate or access a network.

VERSITRON Inc.'s June xx.xx 2026 announcement introduces a marketed tethered-drone conversion platform, adding an active-component comparison alongside cable and tether-station offerings. ■■■■ ■■■■ ■■■ ■■■■ ■ ■■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ OEMs should compare the proposed converter's delivery and support

boundary with separately sourced media and system responsibility, rather than infer package completeness from a product launch.

Legacy-brand continuity can also change the account-access question. Vislink's 2024 annual filing describes discontinuing Poway operations and transitioning remaining activities after the earlier BMS asset acquisition; its BMS continuity page provides a support route. ■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■■■■■ ■■ ■■■■■ ■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■■■■

Sources & Evidence

1. Galaxy 1 partners with Viasat to deliver rapid, scalable and secure communications for uncrewed aircraft
   · The March xx.xx 2026 Galaxy xx.xx collaboration announcement describes Velaris provisioning, billing, integration and lifecycle coordination. It does not establish individual customer duties or access permissions. ([viasat.com](https://www.viasat.com/news/latest-news/aviation/2026/galaxy-xx.xx-partners-with-viasat/))
2. Motorola Solutions, Inc. Form 8-K reporting completion of the Silvus acquisition
   · The filing definitively establishes the completed transaction date, not transferred offering-specific warranties or finished product integration. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/d88358d8k.htm))
3. Statement: Spectrum for Unmanned Aircraft Systems (UAS)
   · The separate network-agreement requirement limits what the announced managed Velaris delivery layer can independently grant. ([ofcom.org.uk](https://www.ofcom.org.uk/spectrum/radio-equipment/spectrum-for-unmanned-aircraft-systems))
4. StreamCare+ - Silvus Technologies
   · The separately marketed support program supports distinguishing support entitlement from ownership change. ([silvustechnologies.com](https://silvustechnologies.com/resources/streamcare-plus/))
5. Patria has signed an agreement with Airbus Defence and Space for SIRTAP datalink solution
   · The signed agreement establishes program access, not completed generation-specific delivery or customer acceptance. ([news.cision.com](https://news.cision.com/patria-group/r/patria-has-signed-an-agreement-with-airbus-defence-and-space-for-sirtap-datalink-solution%2Cc4105786))
6. Patria CANDL securing UAV networks in contested environments
   · Patria's 2026 article schedules CANDL xx.xx series production for autumn 2026 and deliveries for late 2026. These are announced milestones, not evidence of completed acceptance. ([patriagroup.com](https://www.patriagroup.com/newsroom/patria-magazine/tech/patria-candl-securing-uav-networks-in-contested-environments))
7. Rocket Lab Completes Mynaric Acquisition, Adding Laser Optical Communications To Growing Space Systems Portfolio
   · The completed acquisition establishes an ownership event, distinct from product-specific support or commercial availability commitments. ([rocketlabcorp.com](https://rocketlabcorp.com/updates/rocket-lab-completes-mynaric-acquisition-adding-laser-optical-communications-to-growing-space-systems-portfolio/index.php))
8. Nokia Corporation Report for Q2 and Half Year 2026
   · Nokia's July xx.xx 2026 report classifies ECE as discontinued operations because reaching a sale agreement was considered highly probable. It does not report a completed ECE transfer. ([nokia.com](https://www.nokia.com/newsroom/nokia-corporation-report-for-q2-and-half-year-2026/))

9. VERSITRON Introduces Tethered Drone Fiber Optic Converters
   - The June xx.xx 2026 announcement establishes marketed platform availability; its compliance wording remains a company claim rather than independent qualification evidence. ([versitron.com](https://www.versitron.com/pages/versitron-introduces-ndaa-compliant-tethered-drone-fiber-optic-converters-for-secure-airborne-communications))
10. Vislink Technologies Form 10-K - Year Ended December 31, 2024
   - The filing describes discontinuing Poway operations and transitioning remaining activity following the restructuring initiative, rather than establishing unchanged independent BMS operations. ([vislink.com](https://www.vislink.com/wp-content/uploads/2025/xx.xx/Vislink-Technologies-Inc-xx.xx-xx.xx-2025-Form-xx.xx-K-December-xx.xx-2024-Filed-Version.pdf))
11. BMS Support and Product Continuity | BMS Is Now Part of Vislink
   - The published support route is counterevidence to inferring complete product discontinuation solely from an operational transition. ([vislink.com](https://www.vislink.com/product/bms-broadcast-microwave-services/))

20.4. Product Portfolio Analysis, 2025

Drone data-link portfolios differ most consequentially in the responsibility being sold. [redacted] These are relevant subsystem alternatives, but their published portfolios do not establish interchangeable aircraft acceptance, destination eligibility or support obligations.

Specialist portfolios provide additional alternatives without reproducing the same purchasing boundary. Commtact distinguishes aircraft-side and base-station products and identifies satellite offerings as planned rather than already interchangeable with its marketed line-of-sight products. [redacted]

Merchant-radio and component purchasing remains distinct from buying a configured package. [redacted] Breadth across these functions is not evidence that every product transports the same mission information or replaces the same endpoints.

[illegible] Their commercial contribution is the configured deliverable and associated accountability. An OEM choosing this route should obtain package-level acceptance and support commitments rather than transfer an originating supplier's claims to the integrator's entire offering.

[illegible] Nokia combines communications with drones, docking and edge-processing equipment. These offerings can suit aircraft or mission-package purchasers, but a complete platform is not equivalent to a separately supplied data-link subsystem.

Elsight and uAvionix extend the purchase into communications management. Halo combines bearer options with management arrangements; SkyLink's full functionality depends on SkyLine management. [illegible]

Satellite portfolios separate network provision from terminal supply. [illegible] Terminal alternatives should be compared within the applicable network relationship; buying equipment does not independently secure connectivity or operating permission.

Software and channels add complementary, not equivalent, portfolio coverage. [illegible] Buyers should separate the transmission contribution from broader mission applications and identify which counterparty owns each continuing obligation.

Consumer and FPV portfolios also separate video from control. ▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ Divimath's declared HDZero technology ownership is additionally distinct from an executed third-party licensing agreement.

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Sources & Evidence

1. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
   - Elsight markets Halo as a connectivity platform with management arrangements and OEM purchasing relevance. ([elsight.com](https://www.elsight.com/products/halo-for-commercial-use/))
2. Velaris - BVLOS connectivity for UAVs
   - Viasat presents Velaris as its satellite communications service for UAV and advanced-air-mobility applications. ([viasat.com](https://www.viasat.com/aviation/advanced-air-mobility/velaris/))
3. UAV/UGV Products - Advanced Microwave Products
   - AMP's unmanned-platform catalog separates analog video, data products and supporting amplifiers, supporting function- and endpoint-specific peer groups. ([advmw.com](https://advmw.com/uav-ugv-products/))
4. GORE Tethered Drone Cables for Commercial & Defense
   - Gore's drone-cable portfolio distinguishes electrical data and optical-fiber contributions from the complete terminal or station deliverable. ([gore.com](https://www.gore.com/products/tethered-drone-cables-commercial-defense))
5. Mynaric AG Form 20-F for the Year Ended December 31, 2021
   - Mynaric's historical annual filing identifies HAWK airborne terminals and UAV applications, supporting its distinct free-space-optical category. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/d310942d20f.htm))
6. Secure Wideband Data Links | Cubic
   - Cubic presents airborne, surface and relay terminals with UAV applications and reports CDL waveform verification by JITC. This supports a standards-oriented portfolio comparison, not aircraft-wide procurement acceptance. ([cubic.com](https://www.cubic.com/solutions/c5isr/assured-data-link-solutions/secure-wideband-data-links))
7. Software-Defined Radios | Cubic
   - Cubic distinguishes software-defined radios from integrated communications packages extending from modem to antenna. ([cubic.com](https://www.cubic.com/defense/secure-communications/software-defined-radios))

8. Unmanned Systems Datalinks
   · Silvus' unmanned-systems brochure identifies StreamCaster radios for command, telemetry and video communications; it is family-level historical portfolio evidence. ([silvustechnologies.com](https://silvustechnologies.com/wp-content/uploads/2018/xx.xx/StreamCaster-Unmanned-Systems-Datalinks.pdf))
9. Triad High Power Radio Systems For Unmanned Land Air Sea
   · Triad identifies originating radios within its unmanned-system packages, including Silvus, DTC and Mobilicom relationships. ([triadrf.com](https://triadrf.com/radio-systems/))
10. Mesh Rider Radios - Doodle Labs
    · Doodle Labs presents Mesh Rider radios for OEM and unmanned-platform purchasing, supporting its merchant-radio role. ([doodlelabs.com](https://doodlelabs.com/products/radios))
11. Astro - US Made Commercial Drone
    · Freefly identifies a Doodle Labs radio, LTE connectivity and AuterionOS within Astro, establishing an aircraft-side incorporation relationship. ([freeflysystems.com](https://freeflysystems.com/astro))
12. Microhard - Products
    · Microhard's catalog identifies digital data-link and Pico families, supporting an originating component-supplier role. ([microhardcorp.com](https://www.microhardcorp.com/products.php))
13. Datalinks | UAV Navigation
    · UAV Navigation identifies Microhard modems within TELEM07 variants and states compatibility with its autopilots. ([uavnavigation.com](https://uavnavigation.com/products/peripherals/datalinks))
14. SkyHopper Pro - Mobilicom
    · Mobilicom markets SkyHopper PRO with its named ICE cybersecurity proposition. This supports combined commercial scope, not independently demonstrated superiority. ([mobilicom.com](https://mobilicom.com/products/skyhopperpro/))
15. SkyLink - uAvionix
    · uAvionix states that SkyLink requires SkyLine management integration for full functionality. ([uavionix.com](https://uavionix.com/product/skylink/))
16. DJI O4 Air Unit Series - FAQ - DJI
    · O4's documented receiver relationship supports a digital-video portfolio distinction, not cross-brand compatibility. ([dji.com](https://www.dji.com/o4-air-unit/faq))
17. Arycom announcement of Velaris UAV connectivity with Viasat and Gotonomi
    · Arycom's own public announcement identifies a Velaris proposition involving Viasat and Gotonomi; it does not establish an executed customer contract. ([linkedin.com](https://www.linkedin.com/posts/arycom_velaris-arycom-viasat-activity-xx.xx-Nvhd))
18. Gotonomi Completes Successful Flight Trials and Opens Orders
    · Gotonomi's bundle announcement separately identifies terminal hardware, Videosoft software and licensing, and Viasat airtime. ([gotonomi.com](https://gotonomi.com/resources/gotonomi-completes-successful-flight-trials-and-opens-orders/))
19. Support - Elistair | Tethered Drone Company
    · Elistair explains that tethered data transfer depends on the aircraft and can differ from tether-power compatibility. ([elistair.com](https://elistair.com/client-support/))
20. Surveillance Drone UAV Video Solutions | Videosoft Global
    · Videosoft markets drone-facing video transmission software and associated network-facing solutions. Externally attributed market estimates and promotional outcome claims are excluded. ([videosoftglobal.com](https://www.videosoftglobal.com/industries/drones/))

21. Nokia unveils first CE-certified 5G automated drone-in-a-box solution for secure, reliable public sector and industrial operations
    - Nokia describes Drone Networks as a cellular-connected package containing aircraft, docking and edge processing, supporting separation of its communications contribution from the wider platform. ([nokia.com](https://www.nokia.com/newsroom/nokia-unveils-first-ce-certified-5g-automated-drone-in-a-box-solution-for-secure-reliable-public-sector-and-industrial-operations/))
22. COMMUNICATION SOLUTIONS - S-PLANE Automation
    - S-PLANE combines its communications equipment with third-party links and offers integration support, establishing an integration role distinct from every incorporated supplier. ([s-plane.com](https://s-plane.com/solutions/communication-solutions/))
23. Technology | HDZERO
    - HDZero identifies Divimath as developer and owner of its technology; that statement does not establish negotiated third-party licensing rights. ([hd-zero.com](https://www.hd-zero.com/technology))
24. Divimath HDMI VTX - Digital 5.8 GHz HDMI Wireless Link for FPV and Embedded Systems
    - Divimath markets HDMI VTX for FPV and embedded applications and identifies supported digital receivers, establishing a video-link product boundary. ([divimath.com](https://www.divimath.com/products/divimath-hdmi-vtx))
25. Unleashing the Power of Swappable Radio Modules (SRM): The Future of Connectivity Is Here.
    - UXV describes swappable-radio integrations involving Persistent Systems, Silvus, Doodle Labs, Microhard and TrellisWare. ([uxvtechnologies.com](https://www.uxvtechnologies.com/news/unleashing-the-power-of-swappable-radio-modules-srm-the-future-of-connectivity-is-here))
26. HiveLink High-Assurance Data Link Radio | L3Harris
    - L3Harris markets HiveLink for UAV and other airborne platforms and identifies supported standardized waveforms. Its own offering description does not establish buyer-specific acceptance. ([l3harris.com](https://www.l3harris.com/all-capabilities/hivelink-high-assurance-data-link-radio))
27. Telemetry Radios - Holybro
    - Holybro's telemetry catalog lists SiK and Microhard-branded telemetry products, establishing differentiated package choices without asserting fulfillment. ([holybro.com](https://holybro.com/collections/telemetry-radios))
28. UAS Radios: Wi-Fi, Microhard, Doodle Labs, LTE | ModalAI
    - ModalAI lists Microhard communications products and modem add-ons alongside cellular communications products for its platform. ([modalai.com](https://www.modalai.com/pages/radios))
29. Autonomous Systems | Iridium
    - Iridium presents autonomous-aircraft connectivity and identifies partner products from NAL Technologies, Ground Control, ATMOSPHERE and SKYTRAC. ([iridium.com](https://www.iridium.com/markets/aviation/autonomous-systems))
30. RockREMOTE UAV | Ground Control
    - Ground Control markets RockREMOTE UAV using Iridium service and distinguishes enclosed and OEM product forms. ([groundcontrol.com](https://www.groundcontrol.com/product/rockremote-uav/))
31. Droniq Traffic-Management Software and Communications Hardware
    - Droniq combines communications hardware with online traffic-management access and describes LTE transfer of position and optional payload information. ([droniq.de](https://droniq.de/produkte/verkehrsmanagement/utm/))
32. Vodafone Germany Launches Platform for Commercial Drones
    - Vodafone identifies FlyNex as its DroNet Hub partner and describes a dedicated live-data connectivity service in Germany. ([vodafone.com](https://www.vodafone.com/news/newsroom/technology/vodafone-germany-launches-platform-for-commercial-drones))

33. AURA Network Systems - Solutions
    · AURA presents aviation-focused communications and states that its data technologies and services are being developed. This supports a commercial-status distinction, not deployed-service equivalence. ([auranetworksystems.com](https://auranetworksystems.com/solutions))
34. Custom Optical Fiber Solutions for Aerospace, Military and Defense | M2 Optics
    · M2 Optics identifies custom optical-fiber solutions with drone and UAV applications, supporting a specialized physical-link contribution rather than complete terminal supply. ([m2optics.com](https://www.m2optics.com/company/industries/custom-optical-fiber-solutions-for-aerospace-military-and-defense-communications-labs-and-networks))
35. Linden Photonics Enhances Drone Capabilities with Advanced Tether Cables
    · Linden Photonics' April xx.xx 2025 company article identifies drone tether cables and distinguishes its cable activity from planned tether-management expansion. Only commercial offering identity is used. ([lindenphotonics.com](https://www.lindenphotonics.com/linden-photonics-enhances-drone-capabilities-with-advanced-tether-cables))
36. VERSITRON Introduces Tethered Drone Fiber Optic Converters
    · VERSITRON announced a tethered-drone fiber-optic conversion platform on June xx.xx 2026, establishing an active-component offering distinct from cable-only procurement. ([versitron.com](https://www.versitron.com/pages/versitron-introduces-ndaa-compliant-tethered-drone-fiber-optic-converters-for-secure-airborne-communications))
37. Fiber Optic Communications System | Kinetic Industries
    · Kinetic Industries markets a fiber-optic communications package for unmanned platforms, supporting a package-level comparison distinct from cable or converter supply. No operating guidance or performance claims are used. ([kineticindustries.us](https://www.kineticindustries.us/fiber-optic-spool-system))
38. Walksnail Avatar HD VTX V2 Module | CADDXFPV
    · CADDXFPV's official listing presents a Walksnail Avatar video-transmission module, supporting a distinct digital-video offering rather than asserted cross-brand receiver interchangeability. ([caddxfpv.com](https://www.caddxfpv.com/products/walksnail-avatar-hd-vtx-v2-only))
39. Receivers - RadioMaster RC
    · RadioMaster's official catalog includes ExpressLRS receivers, supporting its control-link equipment role. ([radiomasterrc.com](https://www.radiomasterrc.com/collections/receivers))
40. Receivers - BETAFPV
    · BETAFPV's official catalog lists ExpressLRS receivers, supporting a control-link equipment proposition. ([betafpv.com](https://betafpv.com/collections/receivers))
41. Product Finder | ExpressLRS
    · The ExpressLRS project publishes hardware-specific support references involving RadioMaster, BETAFPV, FrSky and SIYI, and identifies listed devices as project-supported. ([expresslrs.org](https://www.expresslrs.org/product-finder/))
42. CRSF Shot and Open TX | Team BlackSheep Support
    · Team BlackSheep's own support page documents its Crossfire ecosystem, supporting a named control-link portfolio relationship without asserting universal compatibility. ([team-blacksheep.com](https://www.team-blacksheep.com/new-support/kb/xx.xx/))
43. Tactical Communication Products | Commtact
    · Commtact identifies platform and base-station link products and describes satellite solutions as planned. ([commtact-systems.com](https://commtact-systems.com/products/))
44. ASELSAN 2023 Annual Report
    · ASELSAN's 2023 annual report identifies TRustLink with UAV applicability. This is historical offering evidence, not confirmation of current generation availability. ([wwwcdn.aselsan.com](https://wwwcdn.aselsan.com/api/file/2023_aselsan_annual_report_082024.pdf))

45. ELTA Communication Suite for UAVs | Israel Aerospace Industries
· IAI's ELTA UAV communications suite combines line-of-sight and satellite communications in a modular commercial offering. Only category and offering scope are used. ([iai.co.il](https://www.iai.co.il/wp-content/uploads/2025/xx.xx/ELTA-ELK-1882T-Communication-Suite-For-UAVs.pdf))
46. The StarLite Data-Link Series | Elbit Systems
· Elbit's StarLite brochure identifies a line-of-sight communications family for manned and unmanned platforms, supporting a subsystem portfolio role. ([elbitsystems.com](https://elbitsystems.com/media/Starlite_family-xx.xx.pdf))
47. Avionics | Leonardo Electronics
· Leonardo identifies DLMS as a data-link management contribution for manned and unmanned aerial platforms, supporting separation from a complete originating radio link. ([leonardo.us](https://www.leonardo.us/avionics))
48. Data Link | TUALCOM
· TUALCOM presents component data links and turnkey solutions including ground-station arrangements, supporting different package boundaries. ([tualcom.com](https://www.tualcom.com/data-link/))
49. UAV Radio Data Links | Transbit
· Transbit identifies aircraft and ground radio modules for tactical UAV links and a distinct PAXLINK-M micro-drone offering. ([transbit.com.pl](https://www.transbit.com.pl/uav-radio-data-links))
50. Unmanned | Radionor Communications
· Radionor identifies communications products for unmanned aircraft, including dedicated UAV and small-unmanned-system offerings. Promotional superiority claims are not used. ([radionor.no](https://radionor.no/domain/unmanned/))
51. Airborne Communications | Rohde & Schwarz
· Rohde & Schwarz identifies UAV applicability within its multipurpose M3AR airborne-radio family. ([rohde-schwarz.com](https://www.rohde-schwarz.com/us/solutions/aerospace-and-defense/air/airborne-communications/airborne-communications_250736.html))
52. MANET/FANET Solutions | Huneed Technologies
· Huneed identifies FANET modules with UAV applications, supporting a specialist-module role without procurement-qualification claims. ([huneed.com](https://www.huneed.com/manetfanetsolutions?lang=en))
53. SkyARX | CTech
· CTech markets SkyARX satellite communications for manned and unmanned aerial platforms, including UAV control and data applications. ([ctech.com.tr](https://ctech.com.tr/en/product/skyarx/))
54. Small Satcom | Honeywell Aerospace
· Honeywell's Small Satcom portfolio lists VersaWave with a small-unmanned-aircraft application, supporting a terminal-side comparison rather than originating-network attribution. ([honeywellaerospace.com](https://www.honeywellaerospace.com/us/en/products-and-services/products/cabin-and-cockpit/satellite-communications/small-satcom))
55. Communications | RFDesign
· RFDesign describes TXMOD and supported modem relationships within its communications portfolio, supporting an integrated telemetry-and-control purchasing boundary. ([rfdesign.com.au](https://rfdesign.com.au/communications/))
56. Skynode X: The New Evolution of Auterion's Autopilot
· Auterion's Skynode X announcement identifies a connected avionics proposition and its hardware/software ecosystem, supporting separation of embedded communications from merchant radios. ([auterion.com](https://auterion.com/introducing-skynode-x-the-next-evolution-of-auterion-skynode/))
57. Skydio Announces Upgraded Wireless and Connectivity Capabilities
· Skydio describes connectivity options associated with its X10 aircraft, supporting an aircraft-specific portfolio boundary. Announced availability is not converted into universal current fulfillment. ([skydio.com](https://www.skydio.com/blog/skydio-announces-upgraded-suite-of-wireless-and-connectivity-capabilities))

58. UAV Systems | WB GROUP
   - WB GROUP's UAV portfolio includes a flight-control and data-transmission contribution. This does not establish separate merchant availability of every subsystem. ([wbgroup.pl](https://www.wbgroup.pl/en/obszar-dzialalnosci/uav-systems/))

20.5. Benchmarking Analysis, 2025

A defensible benchmark starts with the offered deliverable and its commitment status, then evaluates aircraft acceptance, jurisdictional access, management entitlement and support accountability. Supplier portfolios are evidence of proposed commercial coverage, not a league table of equivalent capabilities. [redacted]

[redacted] These distinctions prevent marketed capability, interoperability statements and purchase-ready access from being treated as the same qualification signal. DIU's Framework announcement likewise separates selection for verification from completed additions.

Lifecycle coverage should be compared as an actual purchased entitlement. Silvus Technologies markets StreamCare+ support options, while Domo Tactical Communications offers integration and continuing lifecycle support. [redacted]

Regional service benchmarks should retain their actual access conditions. [redacted] Buyers should confirm the intended aircraft, service territory, included software and escalation responsibility before treating regional propositions as substitutes.

Product-specific documentation can expose narrower compatibility boundaries than a brand comparison. [redacted]

■■■■■■■ ■■■ ■■■■■■■ Such documentation supports a configuration-specific acceptance check; it does not establish independent comparative performance or universal interchangeability.

Mynaric AG requires a status benchmark rather than a capability score. ■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■ ■■■ ■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■ ■■■ ■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■ ■■■ ■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■ ■ ■■■■■ ■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■ ■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■ Historical airborne engagement also prevents treating the unresolved status as evidence of no relevant activity.

BMS, Vislink of Poway LLC requires brand-versus-counterparty reconciliation. Vislink's annual filing identifies Vislink Poway, LLC as the entity that acquired BMS assets and describes a subsequent operational transition. ■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■ ■■■■■■■■ ■ ■■■■■■■■ ■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■ ■ ■■■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■ ■■■ ■■■■■■ ■■■ ■■■■■■■ ■■■■■ ■■■ ■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■ ■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■ ■■■■■ ■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■■■

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For potential proposals from Autel Robotics, General Atomics Aeronautical Systems, Inc., Hydra Technologies, Hoverfly Technologies, Inc., Baykar, Xmobots, Corporación de la Industria Aeronáutica Colombiana, Albatross Indústria Aeronáutica Ltda., IDETEC UAV Chile, Stella Tecnologia, Spirit Aircraft, INVAP and Fábrica Argentina de Aviones Brig. ■■■ ■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■ ■■■ ■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ Until that boundary is established, an aircraft-level proposal should not be substituted for a merchant-link quotation.

The same attribution requirement affects Milkor (Pty) Ltd., Denel Dynamics, Paramount Advanced Technologies, YANGDA, TELNET Holding, Terra Industries, Briech UAS, Integrated Dynamics, SATUMA (Private) Limited, PT Len Industri, Reactive Drone, Alpi Aviation, Italdron and Unmanned Industries. Their comparable data-link deliverable and retained aircraft-program responsibilities need offering-specific confirmation. ■ ■■■■■■■■■■■■■■ ■■■■■■ ■■■ ■■ ■■■■■■■■■ ■■■ ■■■ ■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■

For RAFAEL Advanced Defense Systems Ltd., Bharat Electronics Limited, Data Patterns (India) Limited, Indra, ST Engineering, Viettel High Tech, EDGE Group, Calidus, Astra Microwave Products Limited and Benua Defence Sdn. ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ Buyers should identify the proposed operating seller, program applicability and permitted delivery destination before comparing institutional supplier names.

▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ Multipurpose satellite activity cannot establish a drone-specific purchasing alternative. The practical benchmark is the contracted communications outcome and its access conditions, not the breadth of the parent telecommunications portfolio.

For CubePilot, MicroPilot, Kutta Technologies, LLC, Embention, Airelectronics, Sky-Drones Technologies Ltd, Unusual Machines, Inc., Orqa d.o.o., Beyond Vision, KSI Data Sciences, Inc., Somewear Labs and Omnitron, the unresolved boundary is a directly comparable transmission or link-management deliverable versus an adjacent controller, interface, compute, display or mission-application contribution. Buyers should identify the included communications function and which supplier supplies the actual aircraft-to-endpoint connection. ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪

Originating-product attribution and package accountability remain material for ZARR, WaveStorm Technologies, Digital Micro Devices, Flying Objects Technologies, LinkAV, ViewproUAV, AVIX, Moneypro Group, SoarApex, Nextech, Aerora Technology and Rebhu Computing Private Limited. ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ A documented reseller route can still be useful, but it should be compared with another channel route rather than credited as independent upstream supply.

▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ These unresolved distinctions prevent a defensible substitution conclusion, not a finding of low competitive importance. The decision trigger is an accountable offering-specific proposal rather than a broad communications or unmanned-systems label.

SDT Uzay & Savunma Teknolojileri, TURLink, Meteksan Defence, Savronik, Creomagic Ltd., Sinan Advanced Industries, Nardan Motor and RAAD Dynamics likewise require confirmation of marketed or licensed status and the entity accepting delivery obligations. ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪

■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ A buyer should not make a schedule-dependent commitment until the proposed offer and its contractual milestones are established.

For Shenzhen Suntor Technology Co., Ltd., IWAVE Communications Co., Ltd., CUAV, WPC Systems Ltd., HiDes, Inc., Japan Radio Co., Ltd., 두타기술 and Macgio LLP, exact product and supplier attribution remains necessary before comparing current drone-link availability. Model history or broader radio activity does not settle the supplied endpoints, legal seller or lifecycle support. ■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■

Sources & Evidence

1. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
   · The Framework distinguishes components from complete aircraft and pending verification from completed additions, supporting status-specific benchmarking. ([diu.mil](https://www.diu.mil/latest/blue-uas-refresh-list-and-framework-platforms-and-capabilities-selected))
2. UAV Data Link and Unmanned Communications - DTC, a Codan Company
   · DTC explicitly offers integration and continuing lifecycle support, supporting a contract-scope benchmark rather than assumed portfolio-wide service entitlement. ([dtccodan.com](https://www.dtccodan.com/solutions/unmanned/))
3. Mynaric AG Form 20-F for the Year Ended December 31, 2021
   · The filing establishes historical airborne commercial engagement but cannot establish present HAWK orderability or continuing UAV-specific support. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/d310942d20f.htm))
4. Secure Wideband Data Links | Cubic
   · Cubic's reported CDL verification establishes a documented interoperability proposition, distinct from acceptance on a buyer's particular aircraft. ([cubic.com](https://www.cubic.com/solutions/c5isr/assured-data-link-solutions/secure-wideband-data-links))
5. Triad High Power Radio Systems For Unmanned Land Air Sea
   · The originating-radio versus package distinction supports requiring an explicit upstream support allocation. ([triadrf.com](https://triadrf.com/radio-systems/))
6. StreamCare+ - Silvus Technologies
   · Silvus markets StreamCare+ support options including priority assistance, shipping and return handling; individual coverage still requires confirmation. ([silvustechnologies.com](https://silvustechnologies.com/resources/streamcare-plus/))
7. DJI O4 Air Unit Series - FAQ - DJI
   · The separate goggle and controller conditions support configuration-specific benchmarking. ([dji.com](https://www.dji.com/o4-air-unit/faq))
8. Support - Elistair | Tethered Drone Company
   · Aircraft-dependent data transfer supports configuration-specific benchmarking rather than assuming a universal wired substitute. ([elistair.com](https://elistair.com/client-support/))
9. Rocket Lab Completes Mynaric Acquisition, Adding Laser Optical Communications To Growing Space Systems Portfolio
   · Rocket Lab announced acquisition completion on April xx.xx 2026 and emphasized satellite and space-program relationships. The announcement does not establish a current HAWK UAV offer. ([rocketlabcorp.com](https://rocketlabcorp.com/updates/rocket-lab-completes-mynaric-acquisition-adding-laser-optical-communications-to-growing-space-systems-portfolio/index.php))
10. COMMUNICATION SOLUTIONS - S-PLANE Automation
    · The incorporated-supplier relationship supports requiring explicit package and upstream support accountability. ([s-plane.com](https://s-plane.com/solutions/communication-solutions/))

11. ドローン向け上空 LTE SIM なら上空電波パッケージ | DJI 対応 | KDDI スマートドローン

    · The distinct connectivity and management conditions support aircraft- and service-specific regional benchmarking. ([kddi.smartdrone.co.jp](https://kddi.smartdrone.co.jp/communication/4g-lte/))

12. Unleashing the Power of Swappable Radio Modules (SRM): The Future of Connectivity Is Here.

    · The marketed integration layer supports comparison of configured purchasing and separately retained supplier coordination.
    ([uxvtechnologies.com](https://www.uxvtechnologies.com/news/unleashing-the-power-of-swappable-radio-modules-srm-the-future-of-connectivity-is-here))

13. HiveLink High-Assurance Data Link Radio | L3Harris

    · HiveLink's standards-oriented product description supports an interoperability-proposition benchmark, not an independent comparative performance score.
    ([l3harris.com](https://www.l3harris.com/all-capabilities/hivelink-high-assurance-data-link-radio))

14. LTE Aerial Use Plan | NTT DOCOMO

    · The aerial plan's equipment and territorial conditions support a regional service benchmark rather than a generic cellular-capability comparison.
    ([docomo.ne.jp](https://www.docomo.ne.jp/charge/lte-joukuriyou-plan/))

15. Droniq Traffic-Management Software and Communications Hardware

    · The equipment-and-management package supports requiring explicit included functions and responsibilities in a regional-service comparison.
    ([droniq.de](https://droniq.de/produkte/verkehrsmanagement/utm/))

16. Vodafone Germany Launches Platform for Commercial Drones

    · The carrier and platform contributions support comparing service scope and counterparties separately.
    ([vodafone.com](https://www.vodafone.com/news/newsroom/technology/vodafone-germany-launches-platform-for-commercial-drones))

17. Vislink Technologies Form 10-K - Year Ended December 31, 2024

    · Vislink's annual filing identifies Vislink Poway, LLC in the September xx.xx 2023 BMS asset acquisition and describes the subsequent Poway operational transition.
    ([vislink.com](https://www.vislink.com/wp-content/uploads/2025/xx.xx/Vislink-Technologies-Inc-xx.xx-xx.xx-2025-Form-xx.xx-K-December-xx.xx-2024-Filed-Version.pdf))

18. BMS Support and Product Continuity | BMS Is Now Part of Vislink

    · Vislink's BMS continuity page provides an identifiable support and product-continuity route under Vislink, without allocating an individual drone-link contract.
    ([vislink.com](https://www.vislink.com/product/bms-broadcast-microwave-services/))

19. Skydroid Support

    · Skydroid's own support material distinguishes its supported controller relationships from SIYI equipment, supporting a product-specific compatibility check.
    ([skydroidglobal.com](https://skydroidglobal.com/pages/skydroid-support))

20. Tactical Communication Products | Commtact

    · The explicit planned satellite status supports separating future portfolio intentions from marketed purchasing alternatives. ([commtact-systems.com](https://commtact-systems.com/products/))

21. CNPC-1000 UAS Command and Control Data Link | Collins Aerospace

    · The explicit notice supports distinguishing marketed capability from verified purchase-ready access.
    ([rtx.com](https://www.rtx.com/collinsaerospace/what-we-do/industries/military-and-defense/communications/tactical-data-links/cnpc-xx.xx-uas-command-and-control-data-link))

22. DUAV | Hanwha Systems

    · Hanwha Systems describes a datalink associated with a brigade-level UAV and its aircraft-ground information exchange. This establishes a program-related offering description, not unrelated merchant availability.
    ([hanwhasystems.com](https://www.hanwhasystems.com/en/business/defense/space/avonics06.do))

21. Company Profiles

21.1. Cubic

Cubic provides a standards-oriented defense communications portfolio spanning airborne, surface and relay terminals. ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ These capabilities make Cubic relevant to buyers whose aircraft programs require a defined CDL communications subsystem rather than a generic radio category.

The commercial choice is between purchasing an identifiable modem or transceiver and contracting for a broader integrated link. Defense procurement teams should establish the applicable model, program acceptance, destination eligibility and continuing support commitment before treating the portfolio's stated interoperability as procurement approval. ▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪

Sources & Evidence

1. Secure Wideband Data Links | Cubic
   - Cubic markets airborne, surface and relay terminals for UAV applications, identifies a Dual Channel Modem developed for MQ-8C Fire Scout, and reports JITC verification of its CDL products. ([cubic.com](https://www.cubic.com/solutions/c5isr/assured-data-link-solutions/secure-wideband-data-links))
   - Company verification: Cubic markets Common Data Link products and airborne, surface and relay terminals explicitly including UAV applications.
   - Company verification: The catalog identifies a dual-channel modem associated with the MQ-8C UAV program.
2. Software-Defined Radios | Cubic
   - Cubic presents EX-xx.xx and Multiband Miniature Transceiver offerings and distinguishes radios from integrated modem-to-antenna solutions, supporting the component-versus-package purchasing distinction. ([cubic.com](https://www.cubic.com/defense/secure-communications/software-defined-radios))
3. Cubic Corporation Modern Slavery Statement - March 21, 2025
   - Company verification: The March xx.xx 2025 statement identifies Cubic Corporation and its operating-company group.
   - Company verification: It identifies Cubic as a privately owned Veritas Capital company and describes continuing defense operations.

21.2. Silvus Technologies

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[redacted] Buyers therefore encounter both originating radio offerings and another supplier's integrated package. Incorporation establishes a supplier relationship, but does not make the package's compatibility, warranty or delivery commitments identical to those of the underlying radio.

Motorola Solutions completed its acquisition of Silvus Technologies Holdings Inc. on August xx.xx 2025. Separately, Silvus markets StreamCare+ plans with priority support, two-way shipping and accelerated return handling. [redacted]

Sources & Evidence

1. Motorola Solutions, Inc. Form 8-K reporting completion of the Silvus acquisition
   - Motorola Solutions' mandatory filing records completion of its acquisition of Silvus Technologies Holdings Inc. on August xx.xx 2025. It establishes ownership change, not reassignment of offering-specific support contracts. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/d88358d8k.htm))
   - Company verification: Motorola Solutions' SEC filing records completion of its acquisition of Silvus Technologies Holdings Inc. on August xx.xx 2025.
2. Unmanned Systems Datalinks
   - Silvus' unmanned-systems brochure identifies StreamCaster radios for video, command-and-control, telemetry and IP-data communications; family-level material does not establish every legacy model's continuing availability. ([silvustechnologies.com](https://silvustechnologies.com/wp-content/uploads/2018/xx.xx/StreamCaster-Unmanned-Systems-Datalinks.pdf))
   - Company verification: Silvus' official StreamCaster brochure presents unmanned-system data-link offerings.
   - Company verification: The document identifies Silvus as the supplier of the StreamCaster product family.
3. Triad High Power Radio Systems For Unmanned Land Air Sea
   - Triad's marketed unmanned radio-system catalog identifies named Silvus radios incorporated into Triad packages, supporting the distinction between originating radio supply and integrated-system supply. ([triadrf.com](https://triadrf.com/radio-systems/))
   - Company verification: Triad's current system catalog identifies Silvus radios within marketed unmanned communication packages, corroborating downstream use.
4. StreamCare+ - Silvus Technologies
   - Silvus markets StreamCare+ for StreamCaster radios with tiered coverage, priority support, two-way shipping and accelerated return handling; individual equipment eligibility requires confirmation. ([silvustechnologies.com](https://silvustechnologies.com/resources/streamcare-plus/))
5. Unleashing the Power of Swappable Radio Modules (SRM): The Future of Connectivity Is Here.
   - Company verification: Named as an upstream radio supplier incorporated into UXV's commercial SRM ecosystem.

21.3. Doodle Labs

Doodle Labs offers Mesh Rider radios in OEM and other commercial formats for aircraft and unmanned-platform integration. Its portfolio describes carriage of video, telemetry and control

traffic. ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■ ■■■■■■ ■■■■ ■■■■■ ■■ ■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■ ■■ ■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■ ■■■■■■■■■

An aircraft manufacturer seeking component-level control can evaluate the applicable Mesh Rider offering, but must retain responsibility for obtaining aircraft acceptance and defining supplier support. ■■ ■■■■■ ■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■ ■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■ ■■■■ ■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■ ■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■ ■■■■■ ■■■■■■■■■■■■ Buyers should specify the contracting entity, exact offering and support owner before committing, particularly when procurement spans those locations.

Sources & Evidence

1. Mesh Rider Radios - Doodle Labs
   - Doodle Labs offers Mesh Rider radios in OEM and other formats for larger vehicles and aircraft and describes carriage of video, telemetry and control traffic. ([doodlelabs.com](https://doodlelabs.com/products/radios))
   - Company verification: Doodle Labs markets Mesh Rider radios in multiple commercial form factors, including aircraft/OEM applications.
   - Company verification: The catalog describes carriage of video, telemetry and control traffic.
2. Astro - US Made Commercial Drone
   - Freefly identifies a Doodle Labs radio in its Astro commercial aircraft offering, providing aircraft-supplier evidence of incorporation and a distinct aircraft-level purchasing context. ([freeflysystems.com](https://freeflysystems.com/astro))
   - Company verification: Freefly's current Astro commercial offering identifies Doodle Labs as its radio supplier.
3. About Us - Doodle Labs
   - Doodle Labs lists offices in the United States and Singapore. Office presence identifies commercial contact locations but does not establish destination-wide delivery entitlement. ([doodlelabs.com](https://doodlelabs.com/about))
   - Company verification: Doodle Labs' corporate page presents one operating business with United States and Singapore offices.
   - Company verification: Its legal footer identifies Doodle Labs LLC, and its corporate history attributes Mesh Rider radios to that business.
4. Case Studies - Doodle Labs
   - Company verification: Doodle Labs' commercial case-study collection identifies its radio integrations with Freefly Astro, Teledyne FLIR SkyRanger R70, and other named unmanned-aircraft platforms.
   - Company verification: These named integrations support its market-specific supplier role without establishing comparable shipments or market share.
5. Unleashing the Power of Swappable Radio Modules (SRM): The Future of Connectivity Is Here.
   - Company verification: Named as an upstream radio supplier incorporated into UXV's commercial SRM ecosystem.

21.4. Microhard Systems Inc.

■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■ ■■■■■■■ ■■■■ ■■■■■ ■■■ ■■■■ ■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■ ■■■■■ ■■■ ■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ Its role

includes originating modem supply rather than only finished, aircraft-branded communications packages. UAV Navigation explicitly identifies Microhard modems inside TELEM07-MH400 and TELEM07-MH900 and describes TELEM07 compatibility with its own autopilots.

That distinction matters to buyers using UAV Navigation equipment: the packaged TELEM07 offering carries a stated autopilot-compatibility proposition that cannot automatically be transferred to a bare Microhard modem. A packaged purchase is relevant when that defined compatibility boundary matches the aircraft program; direct component purchasing preserves supplier-selection control but requires a separately agreed acceptance and support scope. ■■■■■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■ ■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■ ■■ ■■■ ■■■■■■■ ■■■■■■■■ ■■■ ■■■■ ■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■ ■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■ ■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■■■■■

Sources & Evidence

1. Microhard - Products
   - Microhard's catalog identifies Digital Data Links and Pico product families and states that sales and support are undertaken from its Calgary, Alberta headquarters. ([microhardcorp.com](https://www.microhardcorp.com/products.php))
   - Company verification: Microhard's official catalog identifies Microhard Systems Inc. and digital data-link and Pico product categories.
   - Company verification: The catalog identifies company headquarters in Calgary, Alberta, Canada.
2. Datalinks | UAV Navigation
   - UAV Navigation identifies Microhard modems inside TELEM07-MH400 and TELEM07-MH900 and states TELEM07 compatibility with its autopilots, establishing a package-specific commercial compatibility proposition. ([uavnavigation.com](https://uavnavigation.com/products/peripherals/datalinks))
   - Company verification: UAV Navigation's branded TELEM07 product listing independently corroborates Microhard's upstream modem participation in UAV communication packages.
3. Microhard Telemetry Radio - Holybro Store
   - Company verification: Holybro's telemetry-radio listing states that its branded product integrates Microhard Pico Series radio modules, corroborating Microhard's upstream participation.
4. Triad High Power Radio Systems For Unmanned Land Air Sea
   - Company verification: Triad's current system catalog identifies Microhard radios within marketed unmanned communication packages, corroborating downstream use.
5. Unleashing the Power of Swappable Radio Modules (SRM): The Future of Connectivity Is Here.
   - Company verification: Named as an upstream radio supplier incorporated into UXV's commercial SRM ecosystem.
6. All Drone Components and Autonomy Computers | ModalAI, Inc.
   - Company verification: ModalAI's commercial catalog names Microhard digital data-link equipment and related branded integration products.
7. VOXL & VOXL 2 Microhard Modem Add-on with USB Hub | ModalAI, Inc.
   - Company verification: Identified as the radio technology incorporated into ModalAI's VOXL modem package.

21.5. Mobilicom

Mobilicom markets SkyHopper PRO as a bidirectional software-defined-radio data link with ICE cybersecurity protection. ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■ ■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■ Procurement teams should distinguish the

availability of those offerings from independently established security outcomes and require the applicable contractual protection and support scope rather than accepting promotional performance language as an assurance.

Mobilicom's SEC-filed operating release reports that a U.S. drone manufacturer continued placing production orders for SkyHopper PRO during 2025. This supports an OEM supply relationship beyond a demonstration or initial selection. ■■■ ■■■■■■■■ ■■ ■■■ ■■■■■■■■■■ ■■ ■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■ ■ ■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■ ■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■ ■■■ ■■■■■■■■■■■■■■

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Sources & Evidence

1. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
   - DIU names Mobilicom SkyHopper PRO and Pro Lite among selected components and separately reports additions of Mobilicom components to the Framework. The announcement distinguishes selection from completed verification. ([diu.mil](https://www.diu.mil/latest/blue-uas-refresh-list-and-framework-platforms-and-capabilities-selected))
   - Company verification: Government material identifies Skyhopper PRO and Pro Lite in the framework selection process and reports addition of Mobilicom components to the framework.
   - Company verification: The record is not product-specific spectrum authorization.
2. SkyHopper Pro - Mobilicom
   - Mobilicom markets SkyHopper PRO as a bidirectional software-defined-radio data link with ICE cybersecurity protection. The page establishes the offered security proposition, not independent comparative effectiveness. ([mobilicom.com](https://mobilicom.com/products/skyhopperpro/))
   - Company verification: Mobilicom publicly offers the SkyHopper PRO bidirectional software-defined-radio data link.
3. Mobilicom Reports 2025 Year-End Financial Results
   - Mobilicom's SEC-filed release reports continuing 2025 production orders from an unnamed U.S. drone manufacturer for SkyHopper PRO, supporting a company-reported OEM supply relationship rather than a projected award. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ea028293501ex99-xx.xx.htm))
   - Company verification: Mobilicom's SEC-filed 2025 financial and operating release identifies Mobilicom Limited.
   - Company verification: It reports continuing production orders from a United States drone manufacturer for SkyHopper PRO datalinks.
   - Company verification: The disclosed production-order relationship establishes commercial participation beyond framework selection or demonstrations.

21.6. Elsight

Elsight markets Halo as a multibearer connectivity platform combining cellular, satellite and radio links, with Allsight management available through cloud-based and on-premises deployment options. ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■ ■■■■ ■ ■■■■■■■■■■ ■■■■■■ Buyers should evaluate the management deliverable alongside the hardware instead of assuming hardware ownership includes every service entitlement.

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Sources & Evidence

1. Halo: Commercial Drone Connectivity Platform for BVLOS Operations
   · Elsight presents Halo with cellular, radio and satellite connectivity and identifies cloud-based and on-premises Allsight management options, supporting a combined connectivity-and-management purchasing proposition. ([elsight.com](https://www.elsight.com/products/halo-for-commercial-use/))
2. Read our Terms & Conditions
   · Elsight's terms specify a nontransferable embedded-software license, automatic cloud-service renewal, purchased-period support, and exclusions for third-party software integration and connections absent from the quote. ([elsight.com](https://www.elsight.com/terms-conditions/))
3. Elsight Limited - Appendix 4E and Annual Report 2025
   · Company verification: Elsight's 2025 annual report identifies Elsight Limited as the Australian ultimate legal parent, with wholly owned Israeli and United States subsidiaries.
   · Company verification: The report describes executed Halo-related defense contracts and continuing equipment, software, and connectivity activity.
   · Company verification: Its disclosure distinguishes the adjacent Aura portfolio from the Halo unmanned-platform business.
4. Halo for HLS/Public Safety
   · Company verification: Elsight markets Halo for UAV/UGV command/control connectivity.
   · Company verification: The public offering combines cellular, satellite and radio connectivity and provides an OEM product format.

21.7. uAvionix

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[redacted] For U.S. operations relying on Part xx.xx the FAA's BVLOS waiver pathway remains separate from equipment procurement. Test-site activity does not establish permission for the buyer's proposed operation or destination-specific service coverage.

Sources & Evidence

1. Part 107 Waivers
   - The FAA identifies a Part xx.xx waiver pathway for operations beyond the visual-line-of-sight requirement, establishing that the applicable operating permission is separate from communications-equipment procurement. ([faa.gov](https://www.faa.gov/uas/commercial_operators/part_107_waivers))
2. SkyLine UAS Command & Control - C2 for BVLOS
   - uAvionix presents SkyLine management with muLTElink, SkyLink and SkyStation products, supports payload communications within the broader ecosystem, and identifies SkyLine and SkyLink activity at the Choctaw Nation test site. ([uavionix.com](https://uavionix.com/uncrewed-aircraft-systems/uas-command/))
   - Company verification: uAvionix's current commercial page presents SkyLine, muLTElink, and SkyLink within its UAS command-and-control offering.
   - Company verification: The page identifies SkyLine and SkyLink activity at the FAA-designated Choctaw Nation test site.
   - Company verification: This establishes a dedicated aircraft-link and link-management role, not merely general aviation electronics capability.
3. SkyLink - uAvionix
   - uAvionix's SkyLink product documentation states that full functionality requires SkyLine network-management integration, supporting evaluation of equipment and management as a combined purchasing scope. ([uavionix.com](https://uavionix.com/product/skylink/))
   - Company verification: uAvionix publicly offers SkyLink airborne and ground command/control radio products.
   - Company verification: The product page includes a commercial request-for-quote channel.

21.8. Viasat

[redacted] Its distinctive contribution is continuing communications access rather than only merchant equipment supply. Operators should consequently evaluate the service relationship, included terminal and support obligations together; owning a compatible terminal is not equivalent to securing the required network service.

The Galaxy xx.xx collaboration announced March xx.xx 2026 adds a delivery role covering provisioning, billing, integration, monitoring and lifecycle visibility. [redacted]

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Viasat's filing for the quarter ended June xx.xx 2026 identifies TrellisWare Technologies as a majority-owned subsidiary included in consolidated reporting and attributes tactical-networking offerings to that company. Group ownership therefore does not establish a single operating supplier or support counterparty. ■■■■■■ ■■■■■■ ■■■■ ■■■ ■■■■■■ ■■■■■■ ■■ ■■■■■■■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■ ■■■■ ■■■■■ ■■■■ ■■■■■■■■ ■■■ ■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■ ■■■ ■■■■ ■■■■■■■■■■■■

Sources & Evidence

1. Velaris - BVLOS connectivity for UAVs
   - Viasat markets Velaris as a dedicated UAV and advanced-air-mobility satellite communications service using its L-band network, with terminal offerings and a partner ecosystem. ([viasat.com](https://www.viasat.com/aviation/advanced-air-mobility/velaris/))
   - Company verification: Viasat markets Velaris as a dedicated satellite communications service for UAVs and advanced air mobility.
   - Company verification: The offering includes UAV-oriented terminals and command/control connectivity services.
2. Galaxy 1 partners with Viasat to deliver rapid, scalable and secure communications for uncrewed aircraft
   - The March xx.xx 2026 Galaxy xx.xx collaboration announcement describes Velaris delivery responsibilities covering provisioning, billing, integration, terminal monitoring and lifecycle visibility; individual customer contract duties are not established. ([viasat.com](https://www.viasat.com/news/latest-news/aviation/2026/galaxy-xx.xx-partners-with-viasat/))
3. Statement: Spectrum for Unmanned Aircraft Systems (UAS)
   - Ofcom's UK UAS framework requires network-operator agreement for covered satellite and mobile use and separately retains aviation requirements, limiting what a distribution partner can independently grant. ([ofcom.org.uk](https://www.ofcom.org.uk/spectrum/radio-equipment/spectrum-for-unmanned-aircraft-systems))
4. Viasat, Inc. Form 10-Q - Quarter Ended June 30, 2026
   - Viasat's Form xx.xx-Q for the quarter ended June xx.xx 2026 includes majority-owned TrellisWare in consolidated reporting and identifies TrellisWare as an operating supplier within tactical networking. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/vsat-xx.xx.htm))
5. EnerLinks | Viasat
   - Company verification: Viasat markets EnerLinks video/ISR data links.
   - Company verification: The portfolio expressly addresses UAV data-link applications and includes airborne and ground-side products.
6. ARYCOM - Soluções de Conectividade para Drones e eVTOLs
   - Company verification: Arycom's Brazilian drone-connectivity offering identifies Viasat as its satellite-network partner.

21.9. DJI

DJI supplies the O4 Air Unit and O4 Air Unit Pro as separately purchased digital video-transmission products for FPV drones. Its commercial distinction is the supported receiver ecosystem: DJI identifies compatible goggles, excludes third-party flight goggles and limits reuse of O3 accessories. ■■■■■ ■■■■■■■■■■■■ ■■ ■■■ ■■■■■■ ■■ ■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■ ■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■

RESEARCH SAMPLE REPORT

[redacted]

DJI offers a direct store route and identifies authorized sellers. Its channel policy places unauthorized-dealer purchases outside manufacturer warranty service. [redacted]

Sources & Evidence

1. Where To Buy
   - DJI identifies official and authorized sales channels and states that products purchased from unauthorized dealers are outside its warranty services. ([dji.com](https://www.dji.com/where-to-buy/online-retails))
2. DJI O4 Air Unit Series - DJI United States
   - DJI markets the O4 Air Unit and O4 Air Unit Pro as digital video-transmission products and provides a direct DJI Store purchasing route. ([dji.com](https://www.dji.com/o4-air-unit))
   - Company verification: DJI markets the O4 Air Unit and O4 Air Unit Pro as drone-oriented digital video-transmission products.
   - Company verification: The official United States product page provides a purchase route and identifies compatible DJI controllers and goggles.
3. DJI O4 Air Unit Series - FAQ - DJI
   - DJI names compatible goggles and controllers, excludes third-party flight goggles, permits third-party remote controllers subject to its stated compatibility conditions, and identifies only partial O3 accessory compatibility. ([dji.com](https://www.dji.com/o4-air-unit/faq))

21.10. Gore

Gore participates through communications-support components rather than the complete aircraft-to-ground link evidenced by a terminal supplier. Its tethered-drone cable portfolio identifies power, electrical-data and optical-fiber elements for commercial and defense applications. [redacted]

[redacted] Component purchasing preserves supplier-selection flexibility but leaves the OEM with more coordination responsibility than a bundled system purchase. Before awarding supply, buyers should confirm the exact cable offering, regional fulfillment, relevant qualification documentation and responsibility for replacement support; general cable-channel authorization does not settle those offering-specific commitments.

Sources & Evidence

1. GORE Tethered Drone Cables for Commercial & Defense
   · Gore markets tethered-drone cables for commercial and defense applications, identifies power, electrical-data and optical-fiber elements, and links purchasers to a distributor route. The evidenced deliverable is cable hardware rather than a complete terminal system. ([gore.com](https://www.gore.com/products/tethered-drone-cables-commercial-defense))
   · Company verification: Gore markets GORE Tethered Drone Cables combining power and fiber-optic data paths.
   · Company verification: The page establishes a drone-specific physical-tether offering, not complete data-link terminal supply.
2. How to Buy: GORE Bulk Wire & Cables - Authorized Distributors & Agents
   · Gore's bulk-wire-and-cable directory identifies authorized distributors serving North America and Europe and offers contact with Gore representatives. It does not establish local stock of a particular tethered-drone cable. ([gore.com](https://www.gore.com/resources/bulk-wire-and-cables-authorized-distributors-agents))

21.11. Arycom

[redacted] The complementary roles remain important: Viasat provides the underlying Velaris satellite service, while Gotonomi supplies UAV terminal offerings. Arycom's regional presence therefore offers a local commercial contact without establishing ownership of those upstream capabilities.

[redacted] Named partnerships do not establish exclusive distribution rights, an executed customer-service agreement or approval for the buyer's operation. The route is less suitable when the buyer requires direct control of upstream contracts or cannot obtain a clear division of support obligations.

Sources & Evidence

1. Velaris - BVLOS connectivity for UAVs
   · Viasat identifies Velaris as its satellite communications service for UAVs and Advanced Air Mobility, delivered through its L-band satellite network. This supports the distinction between Arycom's regional route and the originating network service. ([viasat.com](https://www.viasat.com/aviation/advanced-air-mobility/velaris/))
2. Arycom announcement of Velaris UAV connectivity with Viasat and Gotonomi
   · Arycom's own announcement identifies its hybrid LTE/satellite UAV Velaris offering and names Viasat and Gotonomi as partners. It establishes a commercial proposition, not an executed customer contract. ([linkedin.com](https://www.linkedin.com/posts/arycom_velaris-arycom-viasat-activity-xx.xx-Nvhd))
3. Arycom | LinkedIn
   · Arycom's public corporate materials identify São Paulo headquarters and a Rio de Janeiro office, and include continuing descriptions of Velaris delivery with Viasat and Gotonomi. These are company-reported presence and offering facts, not verified service-level commitments. ([linkedin.com](https://www.linkedin.com/company/arycom))

4. Gotonomi Completes Successful Flight Trials and Opens Orders
   - Gotonomi identifies its UAV terminal range as connecting through Viasat's Velaris network, establishing the separate terminal and network roles underlying the regional-channel analysis. ([gotonomi.com](https://gotonomi.com/resources/gotonomi-completes-successful-flight-trials-and-opens-orders/))
5. ARYCOM - Soluções de Conectividade para Drones e eVTOLs
   - Company verification: Arycom publicly offers a drone-specific Velaris connectivity solution and identifies Brazilian business addresses.
   - Company verification: The offering identifies Viasat and Gotonomi as partners and names Arycom Capacidade Satelital Ltda in the footer.

21.12. Patria

[redacted] The announced solution is based on CANDL products. This establishes named program participation rather than merely a catalog claim, but the agreement announcement does not establish completed delivery or customer acceptance.

Patria markets CANDL for UAS command-and-control and payload-data communications, giving aircraft-program buyers a combined-function terminal proposition. [redacted] Those dates describe an announced commercialization schedule, not evidence that the new generation has fulfilled a particular order.

[redacted] Program-based procurement can align airborne and ground deliverables, but it also makes supplier access dependent on the prime's requirements and timetable. The SIRTAP agreement should not be treated as transferable qualification for another aircraft program or as proof of availability for an unrelated customer.

Sources & Evidence

1. Connectivity | Patria
   - Patria markets CANDL as an airborne networking datalink for UAS command-and-control and payload-data applications. This establishes the published combined-function offering, not qualification for every aircraft program. ([patriagroup.com](https://www.patriagroup.com/products-and-services/defence-and-weapon-systems/intelligence-and-surveillance/connectivity))
   - Company verification: Patria offers CANDL as an airborne networking data link.
   - Company verification: The company explicitly identifies UAS command/control and payload-data applications.
2. Patria has signed an agreement with Airbus Defence and Space for SIRTAP datalink solution
   - Patria's February xx.xx 2025 company-issued announcement identifies an agreement with Airbus Defence and Space in Spain for a CANDL-based SIRTAP datalink covering airborne vehicles and ground systems. It does not establish completed customer acceptance. ([news.cision.com](https://news.cision.com/patria-group/r/patria-has-signed-an-agreement-with-airbus-defence-and-space-for-sirtap-datalink-solution%2Cc4105786))

3. Patria CANDL securing UAV networks in contested environments
   - Patria's May xx.xx 2026 article scheduled CANDL xx.xx series production for autumn 2026 and deliveries for late 2026. These are announced milestones, not confirmation of completed delivery against a customer order. ([patriagroup.com](https://www.patriagroup.com/newsroom/patria-magazine/tech/patria-candl-securing-uav-networks-in-contested-environments))
   - Company verification: Patria's May xx.xx 2026 business article establishes continuing CANDL portfolio activity.
   - Company verification: It separately states that CANDL xx.xx series production is scheduled for autumn 2026 and deliveries for late 2026; completed deliveries are not established.
4. Patria on allekirjoittanut sopimuksen Airbus Defence and Spacen kanssa SIRTAP-järjestelmän datalink-ratkaisusta
   - Company verification: Patria's February xx.xx 2025 announcement identifies an Airbus Defence and Space agreement to supply airborne and ground datalink solutions for SIRTAP.
   - Company verification: The contracted solution is explicitly based on Patria CANDL products.

21.13. Elistair

[redacted] Its aircraft-specific Air Modules and compatibility inquiry provide a system purchasing route distinct from buying a cable alone. This proposition is relevant to operators considering communications within a tether-compatible mission, but power compatibility and wired-data compatibility must be evaluated separately.

Elistair's support guidance states that data may pass through the tether or through wireless applications depending on the aircraft, and cautions that some manufacturers, including DJI, retain their own wireless data applications. A purchaser seeking a Non-Radio Link should obtain confirmation that the specified aircraft and selected offering support tethered data, rather than infer this from power-tether compatibility. [redacted]

[redacted] The station route can consolidate tether hardware purchasing, but it does not remove aircraft-specific dependencies or establish a local repair commitment in every destination. Missions requiring movement beyond the tethered operating area need a separately suitable communications alternative.

Sources & Evidence

1. Safe-T Drone Power Station
   - Elistair markets Safe-T xx.xx with data-transfer capability, an optical-fiber option and aircraft-specific Air Modules, and asks purchasers to confirm drone compatibility. ([elistair.com](https://elistair.com/solutions/tethering-station-safe-t/))
   - Company verification: Elistair markets the Safe-T xx.xx drone tether station with data-transfer capability and an optical-fiber option.
   - Company verification: The product page identifies Elistair's European business address in Dardilly, France.
2. Support - Elistair | Tethered Drone Company
   - Elistair states that tethered or wireless data transfer depends on the aircraft and notes manufacturer-specific wireless restrictions, including DJI. It identifies maintenance centers in France and the United States and authorized partners providing initial maintenance. ([elistair.com](https://elistair.com/client-support/))

3. Elistair - Station d’alimentation Safe - T 2.2 - Medina Street Group
   - Company verification: Medina Street Group's Moroccan catalog lists Elistair Safe-T xx.xx and advertises tethered data-link options.
   - Company verification: The listing establishes advertised regional channel availability, not completed sales or local production.

21.14. Videosoft Global Ltd

Videosoft Global Ltd contributes drone-facing live-video transmission software and associated solutions rather than an independently established originating network role. ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ This provides a software-layer option for UAV manufacturers and mission-data buyers, but the company's performance language should not be treated as independently demonstrated outcomes for a buyer's aircraft and network.

The commercial separation is visible in Gotonomi's August xx.xx 2024 inspection-and-surveillance bundle announcement, which identifies Videosoft software and its license alongside Gotonomi terminal hardware and Viasat airtime. A bundled purchase consequently combines distinct equipment, software and connectivity commitments. ■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■ ■■ ■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■ ■■■■■■■ ■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■ ■■■■ ■■■ ■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■ ■■ ■■■■■■■■ ■■■ ■■■ ■■■■ ■■■■■■■■■■ ■■■■■■

Sources & Evidence

1. Gotonomi Completes Successful Flight Trials and Opens Orders
   - Gotonomi's August xx.xx 2024 announcement separately identifies terminal hardware, Videosoft video-streaming software and its license, and Viasat airtime within an inspection-and-surveillance bundle. The announcement does not establish customer-specific license or support terms. ([gotonomi.com](https://gotonomi.com/resources/gotonomi-completes-successful-flight-trials-and-opens-orders/))
   - Company verification: Videosoft's video-streaming software is identified within the announced Gotonomi UAV inspection bundle.
2. Surveillance Drone UAV Video Solutions | Videosoft Global
   - Videosoft markets drone-to-ground video delivery and video-transmission software for satellite, mesh and cellular connections. Only its own offering descriptions support the profile; third-party market estimates and promotional outcome claims are not used. ([videosoftglobal.com](https://www.videosoftglobal.com/industries/drones/))
   - Company verification: Videosoft Global offers drone-facing video-transmission solutions connecting UAVs and ground-control systems.
   - Company verification: Its participation is principally video-delivery software and associated solutions rather than an independently established RF-radio manufacturing role.

3. VIDEOSOFT GLOBAL LTD overview - Companies House
   - Company verification: Companies House records Videosoft Global Ltd as active under company number xx.xx.
   - Company verification: The inspected record shows a confirmation statement dated August xx.xx 2026 and accounts made up to December xx.xx 2025.
   - Company verification: Companies House records VIDEOSOFT GLOBAL LTD under company number xx.xx.
4. Live Gotonomi Demo at Xponential Europe 2026 with AIR6 SYSTEMS & Videosoft
   - Company verification: Videosoft Global is identified as a participating commercial partner in the March 2026 UAV connectivity demonstration.
   - Company verification: The event supplements its previously captured production-terminal bundle relationship without establishing sales volume.

21.15. Mynaric AG

[redacted] Its annual filing for 2021 identifies HAWK terminals for aircraft and UAV communications, customer engagement through aerospace primes and demonstration-oriented commercial activity. That record supports an identifiable airborne product and business role, but it does not establish a presently orderable drone configuration.

[redacted] Waiting for that confirmation may delay supplier selection, but relying on a space-focused ownership announcement would leave the airborne commitment unresolved. Historical HAWK customer relationships prevent the opposite inference that commercialization uncertainty means no relevant activity.

Sources & Evidence

1. Mynaric AG Form 20-F for the Year Ended December 31, 2021
   - Mynaric's annual filing for the year ended December xx.xx 2021 identifies HAWK airborne optical terminals, UAV customer targeting, aerospace-prime relationships and demonstration-oriented commercial engagement. It does not establish present HAWK orderability. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/d310942d20f.htm))
2. Rocket Lab Completes Mynaric Acquisition, Adding Laser Optical Communications To Growing Space Systems Portfolio
   - Rocket Lab announced completion of its acquisition of Mynaric AG on April xx.xx 2026. The announcement emphasizes satellite optical communications and space-program relationships and does not establish a current UAV-specific HAWK supply or maintenance commitment. ([rocketlabcorp.com](https://rocketlabcorp.com/updates/rocket-lab-completes-mynaric-acquisition-adding-laser-optical-communications-to-growing-space-systems-portfolio/index.php))
   - Company verification: Rocket Lab announced completion of its acquisition of Mynaric AG on April xx.xx 2026.

3. HAWK - Optical Communication Terminal for Airborne and Ground Operations - Mynaric
   - Company verification: Mynaric's HAWK optical-communications product page explicitly includes UAS connectivity.
   - Company verification: The stated product status is an early-generation product for demonstrations and use-case validation, not evidence of unrestricted current drone-market sales.

21.16. Nokia

[illegible] The identifiable communications contribution remains distinct from the entire aircraft, docking and mission package. A quotation should also name the supported release: Nokia's November xx.xx 2025 update introduced Drone Networks xx.xx XLR rather than establishing interchangeability among every version.

The managed route is suitable only when the contract resolves network access, service delivery, data responsibilities and escalation. [illegible] Partner-led delivery may consolidate administration; the published service proposition does not establish that all operator obligations transfer or that its acquisition alternatives are offered on identical terms in every destination.

Ownership and support continuity require separate diligence. [illegible] Before a multiyear commitment, buyers should identify the contracting and maintenance counterparties and establish how software support and service obligations would continue through any ownership change.

Sources & Evidence

1. Nokia extends partner program to accelerate Drones-as-a-Service business in North America
   - Nokia's December xx.xx 2023 North American partner-program announcement describes purchase, lease, sharing and flight-hire alternatives, with bundled maintenance, analytics and scheduling. The announcement does not establish individual contract responsibilities or universal destination availability. ([nokia.com](https://www.nokia.com/newsroom/nokia-extends-partner-program-to-accelerate-drones-as-a-service-business-in-north-america/))

2. Nokia unveils first CE-certified 5G automated drone-in-a-box solution for secure, reliable public sector and industrial operations
   · Nokia describes Drone Networks as an integrated drone, docking and edge-processing offering using public and private cellular connectivity. The wider system contains distinguishable communications and noncommunications deliverables. ([nokia.com](https://www.nokia.com/newsroom/nokia-unveils-first-ce-certified-5g-automated-drone-in-a-box-solution-for-secure-reliable-public-sector-and-industrial-operations/))
   · Company verification: Nokia's May xx.xx 2023 release identifies Nokia Drone Networks as a dedicated integrated drone solution using cellular connectivity.
   · Company verification: The release identifies Espoo, Finland and states that the solution is manufactured in Europe.
3. Taking industries further with the enhanced Nokia Drone Networks platform
   · Nokia's November xx.xx 2025 update introduces Drone Networks xx.xx XLR. It supports offering-generation diligence without establishing availability or acceptance of every release for every customer. ([nokia.com](https://www.nokia.com/blog/taking-industries-further-with-the-enhanced-nokia-drone-networks-platform/))
4. Nokia Corporation Report for Q2 and Half Year 2026
   · Nokia's July xx.xx 2026 financial report states that Enterprise Campus Edge was classified as discontinued operations in Q2 2026 because an agreement to sell the business was considered highly probable. This is not confirmation of a completed ECE ownership transfer. ([nokia.com](https://www.nokia.com/newsroom/nokia-corporation-report-for-q2-and-half-year-2026/))
5. 自動飛行・遠隔運用に強みを持つ Nokia ECE 製ドローンの国内初の販売権を取得：日立
   · Hitachi's announcement identifies Japanese domestic sales rights for Nokia ECE drones. This supports a channel relationship, not a customer-specific fulfillment or continuing-support guarantee. ([hitachi.com](https://www.hitachi.com/ja-jp/press/articles/2026/xx.xx/xx.xx/))

21.17. S-PLANE Automation

S-PLANE Automation provides an aircraft-and-ground communications integration route from Somerset West, South Africa. Its offering combines TRACKER+, X-ADT and GDT terminals with third-party line-of-sight and satellite links. ■■■■■■■■ ■■ ■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■ ■■ ■■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■

Aircraft manufacturers seeking coordinated delivery can evaluate its system-integration and certification-support services alongside the equipment. The potential coordination benefit depends on the agreement naming incorporated suppliers, network counterparties, acceptance deliverables and continuing support responsibilities. ■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■ ■ ■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■ ■■ ■■■■■■■■ ■■■■ ■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■ ■■■■■■■■■■ ■■■■■ ■■ ■■■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■ ■■■■■ ■■■■■■■■■■■■■■■■■

Sources & Evidence

1. COMMUNICATION SOLUTIONS - S-PLANE Automation
   - S-PLANE markets communications solutions combining TRACKER+, X-ADT and GDT equipment with third-party line-of-sight and satellite links, and offers integration and certification support. Its stated location is Somerset West, South Africa. These support assessing integration responsibility separately from incorporated suppliers. ([s-plane.com](https://s-plane.com/solutions/communication-solutions/))
   - Company verification: S-PLANE markets communication solutions for unmanned aircraft, combining TRACKER+, airborne/ground data terminals and third-party line-of-sight or satellite links.
   - Company verification: The offering page provides a Somerset West, South Africa business address.
2. TRACKER+ - S-PLANE Automation
   - TRACKER+ is marketed as a standalone antenna tracker and radio enclosure. Customers may select their own incorporated radio links or standard alternatives, supporting a commercial choice between coordinated integration and retained radio-supplier control. ([s-plane.com](https://s-plane.com/products/tracker/))

21.18. KDDI SmartDrone Inc.

KDDI SmartDrone Inc. offers Japanese drone operators a dedicated aerial LTE package, including drone-facing and transmitter-facing SIM connectivity. Its Tokyo-based corporate presentation identifies KDDI Corporation and Japan Airlines as shareholders. ■■■ ■■■■■■■ ■■■■ ■■■■■■ ■ ■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■ ■■■■■ ■■■■■■■■ ■■■■■ ■■■ ■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■

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■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■ ■ ■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■ Procurement should confirm included functions, escalation commitments and cloud-data responsibilities. Changes to the supported aircraft or intended service area should reopen the assessment rather than relying on compatibility established for another deployment.

Sources & Evidence

1. ドローン向け上空 LTE SIM なら上空電波パッケージ | DJI 対応 | KDDI スマートドローン
   - The aerial LTE package offers drone and transmitter SIM connectivity, requires compatible equipment, permits connectivity without the management system, excludes ANAFI Ai from that system, and describes its coverage map as indicative rather than guaranteed. ([kddi.smartdrone.co.jp](https://kddi.smartdrone.co.jp/communication/4g-lte/))
   - Company verification: Markets KDDI SmartDrone's dedicated aerial LTE communications package, including drone-facing SIM connectivity.

2. 企業情報 | KDDI スマートドローン株式会社
   - The corporate page identifies a Tokyo location and lists KDDI Corporation and Japan Airlines as shareholders. ([kddi.smartdrone.co.jp](https://kddi.smartdrone.co.jp/company/))
   - Company verification: KDDI SmartDrone's current corporate page identifies KDDI Corporation and Japan Airlines as shareholders, superseding reliance on its wholly owned status at formation.
   - Company verification: The page contains an April xx.xx 2026 operating-company reference and continues to present dedicated drone communications services.
   - Company verification: It identifies the Japanese legal company and the English presentation KDDI SmartDrone Inc.
3. スマートドローン運航管理システム・クラウド | テクノロジー | KDDI スマートドローン株式会社
   - KDDI SmartDrone markets its Flight Operation System and cloud functions for remote supervision and video sharing over the au mobile network in Japan. These functions support comparing retained aircraft-management tools with additional provider software and cloud responsibilities. ([kddi.smartdrone.co.jp](https://kddi.smartdrone.co.jp/technology/control/))
4. Establishment of KDDI SmartDrone Inc. | 2022 | KDDI Corporation
   - Company verification: Establishes KDDI SmartDrone Inc.'s formation on January xx.xx 2022 and KDDI's xx.xx% ownership at formation.
   - Company verification: Describes the transfer of KDDI's drone business and its cellular-enabled remote-flight service role.

21.19. Divimath, Inc.

Divimath, Inc. combines a declared technology-ownership position with identifiable video-transmission products. HDZero identifies Divimath as the developer and owner of its digital wireless video-transceiver technology. ■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■ ■■■ ■■■ ■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■ ■■ ■■■■ ■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■ ■■ ■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■

The HDMI VTX should be assessed as a video-link offering rather than presumed to include a complete flight-management communications service. ■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■ ■■■■ ■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■ ■■■■ ■■■■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■ ■■■■■■■ Equipment buyers should confirm the supported source and receiver relationship; OEMs discussing technology rights should separately establish the proposed license and commercialization permissions.

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Sources & Evidence

1. Technology | HDZERO
   - HDZero identifies Divimath Inc. as the developer and owner of its digital wireless video-transceiver technology. This is the company's technology-ownership statement, not evidence of a negotiated third-party license. ([hd-zero.com](https://www.hd-zero.com/technology))
   - Company verification: Identifies Divimath Inc. as the developer and owner of HDZero digital wireless video-transceiver technology for FPV applications.
2. Divimath HDMI VTX - Digital 5.8 GHz HDMI Wireless Link for FPV and Embedded Systems
   - Divimath markets the HDMI VTX for FPV and embedded applications, specifies HDZero/Divimath digital-receiver compatibility, and excludes MIPI cameras such as its HD90. The listing supports video-link classification and product-specific compatibility checks. ([divimath.com](https://www.divimath.com/products/divimath-hdmi-vtx))
   - Company verification: Markets a Divimath-branded HDMI digital video transmitter for FPV and embedded-system applications.
   - Company verification: The commercial listing identifies compatibility with HDZero and Divimath digital receivers.
3. Authorized Dealers | HDZERO
   - HDZero's authorized-dealer page lists channels in the United States, United Kingdom and Japan. It establishes published dealer relationships, not fulfillment of every Divimath model in those destinations. ([hd-zero.com](https://www.hd-zero.com/dealers))
4. Warranty | HDZERO
   - HDZero's published hobby-product warranty accepts dead-on-arrival claims and excludes crash damage. This supports verifying seller coverage and separately negotiated commercial maintenance rather than inferring continuing service from technology ownership. ([hd-zero.com](https://www.hd-zero.com/warranty))

21.20. UXV Technologies

[redacted] SRoC controllers and SRM accessories provide the commercial integration layer, while SRM Airside USB extends that ecosystem to drone and vehicle applications. This distinguishes UXV's controller and module-integration role from the originating capabilities of the incorporated radio suppliers.

DIU documented SRoC controller use with AgEagle and Skydio aircraft in a June 2024 integration example. [redacted] A new buyer should compare a configured UXV package with direct radio purchasing that retains its own ground-control integration responsibilities.

UXV presents headquarters in Denmark and the United States and lists UXV Technologies ApS and UXV Technologies, Inc. Buyers should identify which entity contracts for the controller and incorporated module, and who handles warranty, repairs and upstream escalation. [redacted]

Sources & Evidence

1. Unleashing the Power of Swappable Radio Modules (SRM): The Future of Connectivity Is Here.
   · UXV describes SRM integrations incorporating Persistent Systems, Silvus Technologies, Doodle Labs, Microhard and TrellisWare radios, together with SRoC controllers and SRM accessories. This supports its configured-controller and integration role rather than attribution of every incorporated radio technology to UXV. ([uxvtechnologies.com](https://www.uxvtechnologies.com/news/unleashing-the-power-of-swappable-radio-modules-srm-the-future-of-connectivity-is-here))
   · Company verification: Markets branded SRM radio integrations for unmanned-system ground-control equipment.
   · Company verification: Names Persistent Systems, Silvus Technologies, Doodle Labs, Microhard and TrellisWare among integrated radio suppliers.
2. UXV Technologies Communications - SRM Airside USB
   · SRM Airside USB is marketed for the UXV swappable-radio ecosystem and drone or vehicle applications. Its advertised compatibility concerns supported module options, supporting configuration-specific rather than universal substitution conclusions. ([uxvtechnologies.com](https://www.uxvtechnologies.com/communication/srm-airside-usb))
   · Company verification: Offers SRM Airside USB for drone and vehicle compatibility with its swappable-radio ecosystem.
   · Company verification: Official materials present UXV Technologies ApS and UXV Technologies, Inc. within the same commercial presentation.
3. Successful Flight Operations Conducted Between Uncrewed Traffic Management System and Blue UAS Platforms at FAA Test Site
   · DIU reports that UXV Soldier Robotic Controller ground stations controlled AgEagle and Skydio aircraft in a June 2024 integration event. This corroborates use in that configuration; it does not establish portfolio-wide procurement qualification. ([diu.mil](https://www.diu.mil/latest/successful-flight-operations-conducted-between-uncrewed-traffic-management))
   · Company verification: A government account identifies UXV Soldier Robotic Controllers as the ground-control equipment used for the participating aircraft.
4. Contact Us
   · UXV's contact page presents headquarters in Denmark and the United States and lists UXV Technologies ApS and UXV Technologies, Inc. Those presentations do not allocate individual contracts, warranties or upstream repair responsibilities. ([uxvtechnologies.com](https://www.uxvtechnologies.com/contact))

21.21. Advanced Microwave Products

Advanced Microwave Products presents itself as a privately owned Reno, Nevada supplier serving commercial, government, military and unmanned-platform applications. ■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■ ■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■■■ This gives buyers distinct component-sourcing choices rather than a single undifferentiated digital-link proposition.

Purchasing comparisons should identify the required video or data function, the matched transmitter and receiver, and any separately supplied support hardware. ■■ ■■■■■■■■■ ■■ ■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■ ■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■ ■■■■■ ■■■■■■■■■■■■■■■■ Buyers should obtain offering-specific confirmation before treating a proposed component set as a substitute for an installed link.

AMP invites custom product requests and provides direct sales and engineering contacts. It also identifies Toronto-based Dyplex Communications as an international distributor. ■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■ ■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■ ■■■■■■ ■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■ ■■■ ■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■

Sources & Evidence

1. UAV/UGV Products - Advanced Microwave Products
   - AMP's UAV/UGV catalog separates analog video transmitters and receivers, FSK data products, encrypted video products and RF amplifiers. These distinct families support function-specific endpoint comparisons and separation of complete links from supporting hardware. ([advmw.com](https://advmw.com/uav-ugv-products/))
   - Company verification: Provides a dedicated UAV/UGV commercial catalog of data, analog and encrypted transmitters, receivers and transceivers.
2. About AMP | Advanced Microwave Products | Reno, NV
   - AMP describes itself as privately owned and located in Reno, Nevada, serving commercial, government, military, UAV and UGV applications. It invites custom product requirements alongside its standard video and data product lines. ([advmw.com](https://advmw.com/about-amp/))
   - Company verification: Identifies Advanced Microwave Products as a privately owned Reno, Nevada business.
   - Company verification: Describes its UAV-facing video and data transmitter/receiver product lines.
3. Contact Us | Advanced Microwave Products | Reno, NV
   - AMP publishes direct sales and engineering contacts and identifies Toronto-based Dyplex Communications as an international distributor. This supports separate manufacturer-direct and distributor routes without establishing identical destination coverage or service obligations. ([advmw.com](https://advmw.com/contact-us/))

22. Companies Covered

Table 588. Global Drone Data Link System Market, Companies Covered

Company
Advanced Microwave Products
Aerora Technology
AeroVironment, Inc.
Airelectronics
Albatross Indústria Aeronáutica Ltda.
Alpi Aviation
ALTI Unmanned
Amimon
Arycom
ASELSAN
Astra Microwave Products Limited
ATMOSPHERE
AURA Network Systems, Inc.
Autel Robotics
Auterion
AVIX
Baltic Viper
BATCOMMS
Baykar
Benua Defence Sdn. Bhd.
BETAFPV
Beyond Vision
Bharat Electronics Limited
BMS, Vislink of Poway LLC
Botlink
Briech UAS
CADDXFPV
Calidus
Coalas Tech
Collins Aerospace

Table 588 - continued

Company
Commtact
Corporación de la Industria Aeronáutica Colombiana
Creomagic Ltd.
CTech
CUAV
CubePilot
Cubic
Data Patterns (India) Limited
Denel Dynamics
Digital Micro Devices
DINARUS
Divimath, Inc.
DJI
Domo Tactical Communications
Doodle Labs
Droniq GmbH
EDGE Group
Egatel
Elbit Systems
Elistair
Elsight
Embention
Flying Objects Technologies
FlyNex GmbH
Freefly Systems
FreeWave Technologies, Inc.
FrSky
Futaba Corporation
Fábrica Argentina de Aviones Brig. San Martin S.A.
General Atomics Aeronautical Systems, Inc.
Gilat Satellite Networks
Gore

Table 588 - continued

Company
Gotonomi
Granta Autonomy
Ground Control
Hanwha Systems
HENSOLDT
HiDes, Inc.
hiSky
Holybro
Honeywell Aerospace
Hoverfly Technologies, Inc.
Hughes
Huneed Technologies
Hydra Technologies
IDETEC UAV Chile
Indra
Integrated Dynamics
INVAP
Iridium
Israel Aerospace Industries
Italdron
IWAVE Communications Co., Ltd.
Japan Radio Co., Ltd.
KDDI SmartDrone Inc.
Kinetic Industries
KSI Data Sciences, Inc.
Kutta Technologies, LLC
L3Harris Technologies
LAT Defence
Leonardo
Linden Photonics, Inc.
LinkAV
M2 Optics

Table 588 - continued

Company
Macgio LLP
Meteksan Defence
Microhard Systems Inc.
MicroPilot
Milkor (Pty) Ltd.
MIWARS
Mobilicom
ModalAI, Inc.
Moneypro Group
Mynaric AG
NAL Technologies
Nardan Motor
Nextech
Nokia
NTT DOCOMO, INC.
Omnitron
Ondas Inc.
Orbit Communication Systems Ltd.
Orqa d.o.o.
Paramount Advanced Technologies
Patria
Persistent Systems, LLC
PT Len Industri
RAAD Dynamics
RACOM
RadioMaster RC
Radionor Communications
RAFAEL Advanced Defense Systems Ltd.
Rajant Corporation
Reactive Drone
Rebhu Computing Private Limited
RFDesign

Table 588 - continued

Company
Rohde & Schwarz
S-PLANE Automation
SATUMA (Private) Limited
Savronik
SDT Uzay & Savunma Teknolojileri
Shenzhen Suntor Technology Co., Ltd.
Silvus Technologies
Sinan Advanced Industries
SIYI Technology
Sky-Drones Technologies Ltd
Skydio
Skydroid
SKYTRAC Systems Ltd.
SoarApex
Somewear Labs
Spirit Aircraft
ST Engineering
Steatite Ltd
Stella Tecnologia
Team BlackSheep
TELNET Holding
Terra Industries
Thales
Thuraya
Transbit Sp. z o.o.
TrellisWare Technologies, Inc.
Triad RF Systems
TUALCOM
TURLink
UAV Navigation
uAvionix
UAVRADIO

Table 588 - continued

Company
Unmanned Industries
Unusual Machines, Inc.
UVS Dynamics
UXV Technologies
VERSITRON Inc.
Viasat
Videosoft Global Ltd
Viettel High Tech
ViewproUAV
Vodafone
WARMAX Technologies
WaveStorm Technologies
WB GROUP
WPC Systems Ltd.
Xmobots
YANGDA
ZARR
두타기술

Sources & Evidence

1. L3Harris Technologies, Inc. 2025 Annual Report
   - Company verification: The 2025 annual report identifies L3Harris Technologies, Inc. and establishes continuing consolidated operations, including its communications business.
   - Company verification: The report supports consolidated-company reporting rather than adding separate representations of its communications operating units.
2. Cubic Corporation Modern Slavery Statement - March 21, 2025
   - Company verification: The March xx.xx 2025 statement identifies Cubic Corporation and its operating-company group.
   - Company verification: It identifies Cubic as a privately owned Veritas Capital company and describes continuing defense operations.
3. AEVEX joins Persistent Systems' Wave Relay Ecosystem
   - Company verification: Persistent Systems, LLC announced an AEVEX Wave Relay ecosystem agreement on May xx.xx 2026.
   - Company verification: The announcement identifies Wave Relay integration into AEVEX's Atlas UAS, establishing a current named aircraft-manufacturer relationship and continuing supplier activity.

4. About Us - Doodle Labs
   - Company verification: Doodle Labs' corporate page presents one operating business with United States and Singapore offices.
   - Company verification: Its legal footer identifies Doodle Labs LLC, and its corporate history attributes Mesh Rider radios to that business.
5. Case Studies - Doodle Labs
   - Company verification: Doodle Labs' commercial case-study collection identifies its radio integrations with Freefly Astro, Teledyne FLIR SkyRanger R70, and other named unmanned-aircraft platforms.
   - Company verification: These named integrations support its market-specific supplier role without establishing comparable shipments or market share.
6. Mobilicom Limited - 2025 Financial Results and Operating Highlights
   - Company verification: Mobilicom's SEC-filed 2025 financial and operating release identifies Mobilicom Limited.
   - Company verification: It reports continuing production orders from a United States drone manufacturer for SkyHopper PRO datalinks.
   - Company verification: The disclosed production-order relationship establishes commercial participation beyond framework selection or demonstrations.
7. Elsight Limited - Appendix 4E and Annual Report 2025
   - Company verification: Elsight's 2025 annual report identifies Elsight Limited as the Australian ultimate legal parent, with wholly owned Israeli and United States subsidiaries.
   - Company verification: The report describes executed Halo-related defense contracts and continuing equipment, software, and connectivity activity.
   - Company verification: Its disclosure distinguishes the adjacent Aura portfolio from the Halo unmanned-platform business.
8. SkyLine UAS Command & Control - C2 for BVLOS
   - Company verification: uAvionix's current commercial page presents SkyLine, muLTElink, and SkyLink within its UAS command-and-control offering.
   - Company verification: The page identifies SkyLine and SkyLink activity at the FAA-designated Choctaw Nation test site.
   - Company verification: This establishes a dedicated aircraft-link and link-management role, not merely general aviation electronics capability.
9. Comrod acquires Triad RF Systems
   - Company verification: Comrod's April xx.xx 2024 announcement records acquisition of a majority share of Triad RF Systems Inc.
   - Company verification: It explicitly states that Triad retains its branding and serves the market as a Comrod company.
10. Triad RF - A Comrod Company
    - Company verification: Comrod's current Triad business page continues to present Triad-branded integrated radio systems and turnkey data-link offerings.
    - Company verification: It expressly identifies unmanned-aircraft systems among the business's commercial application areas.
11. Sobre nosotros - UAV Navigation-Grupo Oesía
    - Company verification: UAV Navigation's corporate page explicitly identifies the operating business as part of Grupo Oesía.
    - Company verification: It describes continuing supply of flight-control solutions to aircraft manufacturers, resolving the previously unassessed immediate group relationship.
12. Virksomhetsopplysninger - RADIONOR COMMUNICATIONS AS
    - Company verification: Norway's official business register identifies RADIONOR COMMUNICATIONS AS under organization number xx.xx.
    - Company verification: The record establishes its Trondheim business address and communications-equipment manufacturing classification.

13. Radionor opens new and advanced manufacturing facility in Selbu
    - Company verification: Radionor's June xx.xx 2026 announcement reports opening a manufacturing facility in Selbu.
    - Company verification: The dated event establishes continuing commercial operations and expansion of radio-product delivery capability; it does not establish drone-specific production volume.
14. Patria on allekirjoittanut sopimuksen Airbus Defence and Spacen kanssa SIRTAP-järjestelmän datalink-ratkaisusta
    - Company verification: Patria's February xx.xx 2025 announcement identifies an Airbus Defence and Space agreement to supply airborne and ground datalink solutions for SIRTAP.
    - Company verification: The contracted solution is explicitly based on Patria CANDL products.
15. Patria CANDL securing UAV networks in contested environments
    - Company verification: Patria's May xx.xx 2026 business article establishes continuing CANDL portfolio activity.
    - Company verification: It separately states that CANDL xx.xx series production is scheduled for autumn 2026 and deliveries for late 2026; completed deliveries are not established.
16. World Defense Show 2026 - HENSOLDT
    - Company verification: HENSOLDT's February xx.xx-xx.xx 2026 World Defense Show portfolio expressly includes the DL-xx.xx video and data terminal.
    - Company verification: This refreshes evidence of continuing portfolio activity beyond the undated product record.
17. RACOM Newsletter 02/2026
    - Company verification: RACOM's February 2026 newsletter announces the WaSP embedded-radio product line and continuing defense-sector commercial activity.
    - Company verification: It identifies in-house development and manufacturing in Czechia and provides a quotation/contact route.
18. Solid State Group - Group Capabilities Brochure
    - Company verification: Solid State Group's capabilities brochure identifies Steatite Ltd as its systems operating division.
    - Company verification: It presents Steatite's communications portfolio, including Wave Relay products and configured systems, supporting operating-company reporting under Solid State.
19. VIDEOSOFT GLOBAL LTD overview - Companies House
    - Company verification: Companies House records Videosoft Global Ltd as active under company number xx.xx.
    - Company verification: The inspected record shows a confirmation statement dated August xx.xx 2026 and accounts made up to December xx.xx 2025.
    - Company verification: Companies House records VIDEOSOFT GLOBAL LTD under company number xx.xx.
20. Xer Technologies Extends X8 BVLOS Capability with Gotonomi Satellite Integration
    - Company verification: An April xx.xx 2026 announcement identifies integration of Gotonomi's Velaris Multi-Link satellite module into Xer Technologies' X8 UAV.
    - Company verification: The announcement establishes a current named integration relationship, not a disclosed delivery volume or procurement award.
21. Live Gotonomi Demo at Xponential Europe 2026 with AIR6 SYSTEMS & Videosoft
    - Company verification: Gotonomi announced a March 2026 commercial demonstration with AIR6 SYSTEMS and Videosoft Global involving remotely piloted UAV connectivity.
    - Company verification: Videosoft Global is identified as a participating commercial partner in the March 2026 UAV connectivity demonstration.
    - Company verification: The event supplements its previously captured production-terminal bundle relationship without establishing sales volume.

22. Current details for ABN 46 133 371 758 - RFDesign Pty Ltd
    - Company verification: Australia's ABN register identifies RFDesign Pty Ltd, an Australian private company, with active ABN xx.xx.
    - Company verification: The record associates the RFDesign trading name with that entity and identifies Queensland as its main business location.
23. 企業情報 - KDDI スマートドローン株式会社
    - Company verification: KDDI SmartDrone's current corporate page identifies KDDI Corporation and Japan Airlines as shareholders, superseding reliance on its wholly owned status at formation.
    - Company verification: The page contains an April xx.xx 2026 operating-company reference and continues to present dedicated drone communications services.
    - Company verification: It identifies the Japanese legal company and the English presentation KDDI SmartDrone Inc.
24. Vislink Technologies, Inc. - Form 10-K for the Year Ended December 31, 2024
    - Company verification: Vislink's 2024 Form xx.xx-K records acquisition of assets from Broadcast Microwave Services, LLC on September xx.xx 2023.
    - Company verification: The filing identifies Vislink Poway, LLC as the associated subsidiary, exposing a naming difference from the staged BMS display title.
25. Kratos Defense & Security Solutions, Inc. - Form 10-Q for the Quarter Ended June 28, 2026
    - Company verification: Kratos' June xx.xx 2026 quarterly filing records completion of its acquisition of Orbit Technologies Ltd on March xx.xx 2026.
    - Company verification: The filing establishes the acquired group's Kratos ownership; the exact relationship to the staged Orbit Communication Systems Ltd. operating identity still requires reconciliation.
26. About US - Skydroid
    - Company verification: Skydroid's business page identifies the Skydroid Technology company presentation and describes its unmanned-system communications portfolio.
    - Company verification: Its corporate history identifies the H16 image-transmission product launch and subsequent link-portfolio activity.
    - Company verification: The history does not establish current availability of every H16 variant or an independently corroborated registered legal name.
27. About Commtact - Tactical Communication Experts
    - Company verification: Commtact's current company page includes management appointments in 2025 and a Yavne business address, supporting continuing operations.
    - Company verification: It continues to link Phoenix and MDLS product families; it does not establish current ultimate ownership.
28. Manned-Unmanned Teaming
    - Company verification: L3Harris publicly promotes miniature transceivers and surface data-link systems for UAV and manned-unmanned communications.
    - Company verification: Its offering material identifies the Bandit radio within its UAV-facing portfolio.
29. Secure Wideband Data Links | Cubic
    - Company verification: Cubic markets Common Data Link products and airborne, surface and relay terminals explicitly including UAV applications.
    - Company verification: The catalog identifies a dual-channel modem associated with the MQ-8C UAV program.
30. Motorola Solutions, Inc. Form 8-K - Silvus acquisition completion
    - Company verification: Motorola Solutions' SEC filing records completion of its acquisition of Silvus Technologies Holdings Inc. on August xx.xx 2025.
31. StreamCaster Unmanned Systems Datalinks
    - Company verification: Silvus' official StreamCaster brochure presents unmanned-system data-link offerings.
    - Company verification: The document identifies Silvus as the supplier of the StreamCaster product family.

32. Persistent Systems, LLC | Unmanned Aerial Systems (UAS) Solutions Overview
    - Company verification: Persistent Systems offers UAS connectivity solutions involving embedded radio modules, ground communication equipment and MPU5-based controller/video-terminal products.
    - Company verification: The offering page explicitly addresses bidirectional UAS connectivity and video transmission.
33. Mesh Rider Radios - Doodle Labs
    - Company verification: Doodle Labs markets Mesh Rider radios in multiple commercial form factors, including aircraft/OEM applications.
    - Company verification: The catalog describes carriage of video, telemetry and control traffic.
34. Microhard - Products
    - Company verification: Microhard's official catalog identifies Microhard Systems Inc. and digital data-link and Pico product categories.
    - Company verification: The catalog identifies company headquarters in Calgary, Alberta, Canada.
35. Microhard Telemetry Radio - Holybro Store
    - Company verification: Holybro's telemetry-radio listing states that its branded product integrates Microhard Pico Series radio modules, corroborating Microhard's upstream participation.
    - Company verification: Holybro markets a branded Microhard Telemetry Radio package.
    - Company verification: The retrieved selected product listing is marked sold out, so immediate availability is not established.
36. SkyHopper Pro - Mobilicom
    - Company verification: Mobilicom publicly offers the SkyHopper PRO bidirectional software-defined-radio data link.
37. Halo for HLS/Public Safety
    - Company verification: Elsight markets Halo for UAV/UGV command/control connectivity.
    - Company verification: The public offering combines cellular, satellite and radio connectivity and provides an OEM product format.
38. SkyLink - uAvionix
    - Company verification: uAvionix publicly offers SkyLink airborne and ground command/control radio products.
    - Company verification: The product page includes a commercial request-for-quote channel.
39. CNPC-1000 UAS Command and Control Data Link | Collins Aerospace
    - Company verification: Collins Aerospace describes CNPC-xx.xx as a UAS command/control data link supporting control, telemetry and downlink services.
    - Company verification: The same page states that required FCC authorization has not been obtained and that the device may not be sold or leased until authorized.
40. EnerLinks | Viasat
    - Company verification: Viasat markets EnerLinks video/ISR data links.
    - Company verification: The portfolio expressly addresses UAV data-link applications and includes airborne and ground-side products.
41. Velaris | Satellite connectivity for UAVs | Viasat
    - Company verification: Viasat markets Velaris as a dedicated satellite communications service for UAVs and advanced air mobility.
    - Company verification: The offering includes UAV-oriented terminals and command/control connectivity services.
42. Small Satcom | Honeywell Aerospace
    - Company verification: Honeywell Aerospace's satellite-communications catalog lists VersaWave 5G as a high-speed global satellite communications system for small UAVs.

43. Honeywell Aerospace Small UAV SATCOM sees beyond visual line of sight
    - Company verification: Honeywell Aerospace's Small UAV SATCOM brochure describes an offering for UAV command/control, live video and collected-data communications.
    - Company verification: The brochure identifies inspection, public safety and other operator applications at the commercial-category level.
44. Honeywell Aerospace reports second quarter results; updates 2026 outlook
    - Company verification: Honeywell Aerospace's August xx.xx 2026 corporate disclosure reports completion of its spin-off on June xx.xx 2026.
    - Company verification: The disclosure identifies Honeywell Aerospace as a standalone publicly traded company.
45. E-LynX UxS - Unified connectivity for manned-unmanned teaming
    - Company verification: Elbit Systems' E-LynX UxS brochure presents a connectivity product category expressly connecting UAS and other unmanned platforms.
46. Communications Archives - IAI
    - Company verification: IAI's communications catalog lists Castellite for UAVs and LOS wideband data-link systems.
    - Company verification: The UAV offering is described as a communications suite for UAV operators and connected control centers.
47. BNET Family - Air, Land & Sea
    - Company verification: RAFAEL's official BNET family brochure includes a NANO BNET variant explicitly designated for UAVs.
    - Company verification: The brochure identifies RAFAEL Advanced Defense Systems as the product-family supplier; current availability is not established by this record.
48. Tactical Communication Products | Commtact
    - Company verification: Commtact markets LOS data-link products for UAV video and mission-data communications.
    - Company verification: The catalog names Phoenix and MDLS product families.
    - Company verification: The page distinguishes current LOS offerings from satellite solutions described as planned.
49. ARTLINK MESH 1000 - ISR Data Link System
    - Company verification: ASELSAN's April 2026 ARTLINK MESH xx.xx brochure presents an ISR data-link system for unmanned aerial, ground and surface platforms.
    - Company verification: The brochure explicitly includes payload-information transmission to ground operators.
50. Leonardo capabilities in UAV platforms, systems and certification
    - Company verification: Leonardo's 2025 corporate presentation lists WBDL, a wideband data link, and DLMS, a data-link management system, among its UAV capabilities.
    - Company verification: The presentation establishes a named UAV-related portfolio capability but not standalone merchant availability.
51. Radar, IFF and datalink | HENSOLDT
    - Company verification: HENSOLDT's South Africa country hub lists the DL-xx.xx video/data terminal within its data-link portfolio.
    - Company verification: The page establishes a South African portfolio presence but does not explicitly resolve the terminal's UAV-specific commercial role.
    - Company verification: HENSOLDT's South Africa country hub includes its data-link portfolio and links the DL-xx.xx product.
52. DJI O4 Air Unit Series - DJI United States
    - Company verification: DJI markets the O4 Air Unit and O4 Air Unit Pro as drone-oriented digital video-transmission products.
    - Company verification: The official United States product page provides a purchase route and identifies compatible DJI controllers and goggles.

53. EVO Lite Series Specifications - Remote control & image transmission
    - Company verification: Autel Robotics' official EVO Lite portfolio record identifies Autel SkyLink as its remote-control/image-transmission system.
    - Company verification: This record supports embedded OEM connectivity rather than independently sold merchant-link equipment.
54. Communications - RFDesign
    - Company verification: RFDesign markets TXMOD as an integrated telemetry and remote-control communication system.
    - Company verification: The product page expressly describes communication between an aircraft and its ground-side controller.
55. RFD900 VideoLink Modem - RFDesign
    - Company verification: RFDesign markets the RFD900 VideoLink module for UAV and other remote-platform applications.
    - Company verification: The official store listing describes combined telemetry and video connectivity.
56. AIRLink - Sky-Drones Technologies Ltd
    - Company verification: Sky-Drones Technologies markets AIRLink as an integrated drone avionics product combining SmartAP and SmartLink.
    - Company verification: The offering includes cellular/internet connectivity and remote-control services.
57. UAV Data Link and Unmanned Communications | DTC, a Codan Company
    - Company verification: DTC markets BluSDR and MeshUltra UAV data-link and unmanned communication offerings.
    - Company verification: The official page identifies DTC as a Codan company.
58. Data Link - TUALCOM
    - Company verification: TUALCOM's official catalog offers data-link products and turnkey systems including ground stations.
    - Company verification: The catalog links its ground-terminal offering to airborne platforms and UAVs.
59. C Band UAV Data Link
    - Company verification: TUALCOM's official C Band UAV Data Link brochure presents a drone-specific video and telemetry communication product category.
60. Datalinks | UAV Navigation
    - Company verification: UAV Navigation markets TELEM07 radio data links compatible with its autopilot portfolio.
    - Company verification: The listed TELEM07 variants incorporate Microhard modems.
    - Company verification: UAV Navigation's branded TELEM07 product listing independently corroborates Microhard's upstream modem participation in UAV communication packages.
61. Triad High Power Radio Systems For Unmanned Land Air Sea
    - Company verification: Triad RF Systems markets THPR radio systems for unmanned command/control and data links.
    - Company verification: Its catalog identifies integrated systems incorporating Microhard and Silvus radios.
    - Company verification: Triad's current system catalog identifies Silvus radios within marketed unmanned communication packages, corroborating downstream use.
    - Company verification: Triad's current system catalog identifies Microhard radios within marketed unmanned communication packages, corroborating downstream use.
62. Embention Manuals | Veronte Avionics SDL | Datalink Manual
    - Company verification: Embention's official SDL documentation identifies SDL as a LOS datalink for UAV communications.
    - Company verification: The overview is dated December xx.xx 2025; it does not by itself establish current commercial availability.

63. Investor Relations | Embention
    - Company verification: Embention's investor page identifies the company and its UAV/avionics business.
    - Company verification: The page identifies Embention Sistemas Inteligentes, S.A. as the corporate legal entity.
64. SOVERON AR Software Defined Airborne Radio | Rohde & Schwarz
    - Company verification: Rohde & Schwarz maintains an official product page for the SOVERON AR software-defined airborne radio.
65. SOVERON AR Airborne Radio
    - Company verification: Rohde & Schwarz's April 2023 SOVERON AR brochure explicitly includes UAV applications and tactical-data/data-link communications.
    - Company verification: The brochure identifies Rohde & Schwarz GmbH & Co. KG in Munich, Germany.
66. Walksnail Avatar HD VTX V2 模块 - CADDX FPV
    - Company verification: CADDXFPV markets the Walksnail Avatar HD VTX V2 video-transmission module for FPV drones.
    - Company verification: The official product page provides a purchase route and identifies Shenzhen fulfillment and international shipping destinations.
67. TrellisWare Launches TW-310 Embedded Datalink Module For UAS Market
    - Company verification: TrellisWare Technologies, Inc. announced the TW-xx.xx embedded UAS datalink module on May xx.xx 2026.
    - Company verification: The announcement identifies San Diego headquarters and positions TW-xx.xx for UAS command/control, ISR data and relay communications.
68. Viasat, Inc. Form 10-Q - Quarter Ended June 30, 2026
    - Company verification: Viasat's Form xx.xx-Q for the quarter ended June xx.xx 2026 identifies TrellisWare Technologies, Inc. as its majority-owned subsidiary.
69. FreeWave Government and Defense Applications - Use Cases at a Glance
    - Company verification: FreeWave's government and defense catalog connects named GXM, MM2 and ZumLink products to UAV command/control and ISR applications.
70. Rugged Wireless Radios for International OEM Applications
    - Company verification: FreeWave's legacy commercial announcement describes general availability of the MM2-13X5W radio for UAS and OEM applications.
    - Company verification: The announcement expressly discusses delivery of UAV communication data in the United States and abroad.
71. Videos - Rajant Wireless Solutions in Action
    - Company verification: Rajant's official business resources describe BreadCrumb DX2 networking for drones and drone swarms.
    - Company verification: The page identifies Rajant's headquarters in Malvern, Pennsylvania.
72. XRD2 - Connected Drones Over Cellular
    - Company verification: Botlink markets XRD2 hardware and software for cellular UAS command/control, telemetry and video.
    - Company verification: The product page states that XRD2 is on the shelf and identifies a Fargo, North Dakota support team and business address.
73. Company - SKYTRAC Systems Ltd.
    - Company verification: SKYTRAC's company page identifies SKYTRAC Systems Ltd. and business locations in Kelowna and Ottawa, Canada.
    - Company verification: Its corporate history identifies DLS-xx.xx within its unmanned-aviation portfolio.
74. SKYTRAC Case Study - Platform Aerospace
    - Company verification: SKYTRAC's case study describes DLS-xx.xx as a satellite transceiver supporting unmanned-aircraft command/control and telemetry.
    - Company verification: The document identifies SKYTRAC as a member of the ACR Group of Companies.

75. About - NAL Technologies
    - Company verification: NAL Technologies' corporate history records the merger of NAL Research and Blue Sky Network in 2024.
    - Company verification: The history records ACR Group's acquisition of NAL Research in 2016.
76. SkyLink 7100
    - Company verification: NAL Technologies markets SkyLink xx.xx satellite/LTE communications for aviation and UAV operations, including command/control and onboard data.
    - Company verification: The product page identifies headquarters in Manassas, Virginia.
77. VERSITRON Introduces NDAA-Compliant Tethered Drone Fiber Optic Converters for Secure Airborne Communications
    - Company verification: VERSITRON announced availability of a tethered-drone fiber-optic converter platform for video and telemetry communications on June xx.xx 2026.
    - Company verification: The announcement identifies VERSITRON Inc. in Newark, Delaware.
78. Kinetic Industries - Fiber Optic Spool System
    - Company verification: Kinetic Industries offers a complete drone fiber-optic communication system, including airborne and ground modules, or individual components.
    - Company verification: The supplier describes the system as American-owned and made in the United States; these are company-stated origin claims.
79. MP2128LRC2 - MicroPilot Integrated UAV Autopilots
    - Company verification: MicroPilot markets MP2128LRC2 integrated airborne/ground UAV packages with redundant data communication links.
    - Company verification: The supplier states that its ground unit uses off-the-shelf radio modems, establishing a packaged-system rather than exclusively upstream-radio role.
80. Contact - MicroPilot
    - Company verification: MicroPilot's official contact page identifies its business address in Stony Mountain, Manitoba, Canada.
81. Unified Video Terminal - Kutta Technologies
    - Company verification: Kutta markets a Unified Video Terminal and describes UAV payload-data receipt and payload/vehicle control functions.
    - Company verification: The page identifies Kutta Technologies, LLC in Phoenix, Arizona as an SNC subsidiary.
82. AeroVironment DDL Digital Data Link - 2015 Product Datasheet
    - Company verification: AeroVironment's 2015 DDL catalog offers UAV communication modules, standalone video transceivers and associated commercial packages.
    - Company verification: The historical document identifies AeroVironment's corporate headquarters in Monrovia, California; it does not establish the present headquarters or current availability.
83. GA-ASI Launches Team SkyGuardian Canada
    - Company verification: GA-ASI's May xx.xx 2018 announcement identifies General Atomics Aeronautical Systems, Inc. and Canadian teaming partners for MQ-9B SkyGuardian.
    - Company verification: The announcement describes satellite data-link connectivity within the aircraft offering; teaming is not represented as a completed Canadian sale.
84. Spectre - Hoverfly Technologies
    - Company verification: Hoverfly markets Spectre tethered UAS and states that its command/control data travels over the tether.
    - Company verification: The supplier describes its drones as designed, built and supported in the United States.
    - Company verification: Hoverfly lists TrellisWare among the radio suppliers associated with its Spectre platform, providing separate downstream offering corroboration.

85. Products - Unusual Machines
    - Company verification: Unusual Machines' current product catalog markets the Fat Shark HDO+ headset with a quotation route.
    - Company verification: The catalog describes HDO+ as built in the United States; this does not establish independent receiver-module or complete-link manufacture.
86. Unusual Machines Completes Acquisitions of Fat Shark and Rotor Riot
    - Company verification: Unusual Machines, Inc. announced completion of its Fat Shark Holdings, Ltd. and Rotor Riot LLC acquisitions on February xx.xx 2024.
    - Company verification: The company identifies Fat Shark's business as FPV goggles and Rotor Riot's role as an e-commerce marketplace.
87. AURA Network Systems - Solutions
    - Company verification: AURA Network Systems, Inc. describes a C2 Link System and aviation radio services for command/control of uncrewed aircraft.
    - Company verification: The solutions page also identifies data technologies and services as developing, qualifying commercial readiness.
88. AURA Network Systems - Infrastructure
    - Company verification: AURA states that airborne radios are available for aircraft integration and ground systems can support customer test flights.
    - Company verification: The company describes United States spectrum rights and network infrastructure; deployed nationwide commercial coverage was not independently established.
89. Company Overview - Ondas Inc.
    - Company verification: Ondas Inc.'s current corporate overview identifies Ondas Networks as its FullMAX wireless business.
    - Company verification: The overview also identifies tethered-UAV offerings with proprietary communications within the group's autonomous-systems portfolio.
90. Ondas Holdings - 2021 Investor Presentation Filed as Exhibit 99.1
    - Company verification: An Ondas 2021 filing presentation explicitly positions FullMAX as a drone-application network supporting command/control and data delivery.
    - Company verification: This historical positioning does not establish current drone-specific shipments or availability.
91. Sobre Nosotros - Hydra Technologies
    - Company verification: Hydra Technologies' Spanish-language company page identifies a Mexico-origin tactical UAS business.
    - Company verification: The company describes integrated offerings spanning avionics and communications; it does not identify a distinct merchant data-link product on this page.
92. GCS - Hydra Technologies
    - Company verification: Hydra markets a branded ground-control-station portfolio that includes communications equipment.
    - Company verification: The inspected page establishes an integrated control-system role, not an independently marketed drone data-link product.
93. Enlace de datos 30km - ZARR
    - Company verification: ZARR's official storefront lists Enlace de datos 30km as a drone data/control-link offering.
    - Company verification: The selected listing is marked sold out; the upstream manufacturer and independent branded-system role are not identified.
94. Customized Canisters with Optical Fiber Cables for Drones and UAVs - M2 Optics
    - Company verification: M2 Optics markets OptiTether drone-specific optical-fiber tether canisters for physical drone communications.
    - Company verification: The page identifies production and headquarters in Raleigh, North Carolina; it does not establish a complete airborne/ground terminal offering.

95. Tethered Drone Cables for Commercial and Defense - Gore
    - Company verification: Gore markets GORE Tethered Drone Cables combining power and fiber-optic data paths.
    - Company verification: The page establishes a drone-specific physical-tether offering, not complete data-link terminal supply.
96. Defense - Linden Photonics Inc
    - Company verification: Linden Photonics' defense page describes optical-fiber communication packs and lists drone tethers among its cable categories.
    - Company verification: The inspected business material does not establish a complete aerial data-link system or current drone-specific sales.
97. ARYCOM - Soluções de Conectividade para Drones e eVTOLs
    - Company verification: Arycom publicly offers a drone-specific Velaris connectivity solution and identifies Brazilian business addresses.
    - Company verification: The offering identifies Viasat and Gotonomi as partners and names Arycom Capacidade Satelital Ltda in the footer.
    - Company verification: Arycom's Brazilian drone-connectivity offering identifies Viasat as its satellite-network partner.
98. NAURU 500C ISR - Xmobots
    - Company verification: Xmobots markets Nauru 500C ISR and identifies the GDT-60A5000 ground data terminal within its integrated communications offering.
    - Company verification: The product page provides a commercial contact route and identifies the aircraft as manufactured in Brazil.
99. Empresas Relacionadas e Excluídas do CESAER
    - Company verification: The Brazilian aerospace registry identifies Albatross Indústria Aeronáutica Ltda and lists a mesh data-link radio among its aerospace/defense offerings.
    - Company verification: The inspected registry is updated October xx.xx 2022; it does not expressly establish UAV applicability.
100. Publicación de Corporación de la Industria Aeronáutica Colombiana
    - Company verification: CIAC's own public statement identifies a primary data link and aircraft/ground-station communications within ART Quimbaya.
    - Company verification: The statement establishes embedded communication activity, not standalone-link commercialization.
101. Informacion del Proveedor
    - Company verification: Chile's Mercado Público provider record identifies Ingeniería y Desarrollo Tecnológico Limitada with the branch name IDETEC UAV CHILE.
102. Meteorología cuenta con nueva herramienta para la adquisición de datos
    - Company verification: A Universidad de Chile account dated March xx.xx 2009 identifies IDETEC UAV Chile as the developer of SIROL xx.xx and describes its university collaboration.
103. LA INDUSTRIA DE LOS DRONES EN ARGENTINA: OPORTUNIDADES PARA SU DESARROLLO
    - Company verification: The government industry paper identifies INVAP's historical SARA involvement; it reports suspension in 2016 and reactivation interest in 2020.
    - Company verification: The government industry paper identifies FAdeA alongside INVAP in SARA and identifies its corporate name.
104. UAV Radio Data Links
    - Company verification: Transbit Sp. z o.o. lists a Warsaw address and UAV air/ground radio-link offerings.
    - Company verification: The catalog identifies PAXLINK-M for smaller drones and describes telemetry, control and video-data roles.

105. Connectivity | Patria
   - Company verification: Patria offers CANDL as an airborne networking data link.
   - Company verification: The company explicitly identifies UAS command/control and payload-data applications.
106. Defence Industry | RACOM
   - Company verification: RACOM connects its WaSP embedded data-radio offering to UAV and UGV networking.
   - Company verification: The page describes a 2025 embedded-radio portfolio expansion and participation in the Czech defense ecosystem.
107. WMX481V3 - eXtended Long Range System
   - Company verification: The XLRS WMX481V3 offering is presented as a command/control and data-link product for unmanned platforms.
   - Company verification: The product page identifies UAV applications and manufacturer-handled customization in Spain.
108. Products - Flying Objects Technologies
   - Company verification: Flying Objects Technologies' catalog lists the FOT-Mini and FOT100 data-link products.
   - Company verification: The FOT-Mini listing identifies video, telemetry and remote-control traffic.
109. About - Best FPV Shop in the World of Flight - Orqa
   - Company verification: Orqa's official company history identifies Orqa d.o.o., founded in 2018.
   - Company verification: The company describes its business as developing products for the FPV-drone industry.
110. FPV Controller - Best Remote Drone Radio Transmitter - Orqa
   - Company verification: Orqa markets FPV.Ctrl as a drone radio-controller product.
   - Company verification: The product page provides a direct purchase route.
111. rapidFIRE - 5.8GHz Receiver Module for FPV Goggles - Orqa
   - Company verification: Orqa's product portfolio includes the rapidFIRE receiver module for FPV goggles.
112. Safe-T Drone Power Station - Elistair | Tethered Drone Company
   - Company verification: Elistair markets the Safe-T xx.xx drone tether station with data-transfer capability and an optical-fiber option.
   - Company verification: The product page identifies Elistair's European business address in Dardilly, France.
113. Unmanned Systems & Remotely-Operated Vehicles - Steatite Communications
   - Company verification: Steatite Ltd identifies a Redditch, United Kingdom business address.
   - Company verification: It offers configured unmanned communications solutions including data links, ground stations and tracking systems based on Wave Relay technology.
114. CASE STUDY: Taking fixed wing UAVs to new heights | Steatite
   - Company verification: Steatite describes communications-system work for UAVE's Prion Mk3 UAV in an official customer case study.
115. Surveillance Drone UAV Video Solutions | Videosoft Global
   - Company verification: Videosoft Global offers drone-facing video-transmission solutions connecting UAVs and ground-control systems.
   - Company verification: Its participation is principally video-delivery software and associated solutions rather than an independently established RF-radio manufacturing role.
116. Gotonomi Completes Successful Flight Trials and Opens Orders
   - Company verification: Gotonomi announced the opening of production-terminal orders on August xx.xx 2024.
   - Company verification: The announcement identifies satellite and hybrid satellite/cellular UAV terminals and an inspection bundle incorporating Videosoft software.
   - Company verification: Videosoft's video-streaming software is identified within the announced Gotonomi UAV inspection bundle.

117. Introducing Gotonomi™ | Gotonomi
    - Company verification: TTP announced the launch of Gotonomi in Cambridge, United Kingdom on August xx.xx 2023.
    - Company verification: The business was introduced with UAV satellite and hybrid-connectivity terminal offerings.
118. HAWK - Optical Communication Terminal for Airborne and Ground Operations - Mynaric
    - Company verification: Mynaric's HAWK optical-communications product page explicitly includes UAS connectivity.
    - Company verification: The stated product status is an early-generation product for demonstrations and use-case validation, not evidence of unrestricted current drone-market sales.
119. Rocket Lab Completes Mynaric Acquisition, Adding Laser Optical Communications To Growing Space Systems Portfolio
    - Company verification: Rocket Lab announced completion of its acquisition of Mynaric AG on April xx.xx 2026.
120. Digital Data Link - Granta Autonomy
    - Company verification: Granta Autonomy markets Hornet DDL as a digital data-link offering.
    - Company verification: The page connects the offering to Hornet XR and integration with unmanned systems and ground-control stations.
121. BC-COMMS - BATCOMMS
    - Company verification: BATCOMMS presents BC-COMMS as a complete communication kit comprising transmitter, receiver and repeater.
    - Company verification: The kit is expressly offered for UAV control and sensor-data applications.
122. Contact - BATCOMMS
    - Company verification: BATCOMMS provides an Estonian business contact for UAV/UGV communication solutions and pricing inquiries.
    - Company verification: The company identifies membership in the Estonian Defence and Aerospace Industry Association.
123. Самоорганизующаяся сеть связи для БПЛА - ДИНАРУС
    - Company verification: The DINARUS UAV business page offers radio modules, software and devices for control, telemetry and image/video traffic.
    - Company verification: The page states that these offerings are developed and produced in Russia; it does not establish the responsible legal entity.
124. Про компанію MIWARS | Український виробник систем РЕБ та VTX
    - Company verification: MIWARS identifies itself as a Ukrainian manufacturer of UAV video-transmission and ELRS control-link products.
    - Company verification: Its company history distinguishes these communication products from its adjacent electronic-warfare offerings.
125. UAV systems - WB GROUP
    - Company verification: WB GROUP's official UAV catalog includes a flight-control and data-transmission offering category.
126. Nokia unveils first CE-certified 5G automated drone-in-a-box solution for secure, reliable public sector and industrial operations
    - Company verification: Nokia's May xx.xx 2023 release identifies Nokia Drone Networks as a dedicated integrated drone solution using cellular connectivity.
    - Company verification: The release identifies Espoo, Finland and states that the solution is manufactured in Europe.
127. Unmanned - Radionor Communications
    - Company verification: Radionor's unmanned-system page explicitly markets radios for UAS connectivity.
    - Company verification: Named offerings include I-BEAM xx.xx UAV, I-BEAM LW and MICRO.

128. About us - Radionor Communications
- Company verification: Radionor Communications identifies itself as a Norwegian company supplying tactical broadband radio systems.

129. IAI and Thales Integrate a New Datalink Capability on Heron
- Company verification: IAI's July xx.xx 2015 announcement identifies Thales as the supplier of the TMA xx.xx terminal integrated on Heron.
- Company verification: This establishes a historical UAV data-link role, not current product availability.

130. X-band radio for UAVs - UVS Dynamics
- Company verification: UVS Dynamics publicly describes UAV radio-link activity.
- Company verification: The inspected business record does not establish delivered commercial products.

131. SkyARX - CTech
- Company verification: CTech's official SkyARX catalog expressly positions the SATCOM terminal for unmanned aerial platforms and UAV command, control and data communications.

132. About Us - CTech
- Company verification: CTech identifies itself as a Turkish Aerospace subsidiary, with headquarters in Istanbul and an Ankara office.
- Company verification: The corporate overview reports use of CTech communications products on ANKA and AKSUNGUR UAVs.
- Company verification: Its operating-country list includes Turkey, the United Arab Emirates, Iraq, Qatar, Saudi Arabia and Jordan; the list is not product-specific sales evidence.

133. SDT Uzay & Savunma Teknolojileri - Drone Data Link Sistemleri
- Company verification: SDT's official Turkish solutions page lists Drone Data Link Systems for UAV control, coordination, payload information and telemetry.
- Company verification: The page describes development and customer customization; it does not establish current delivered-product availability.

134. About Us | TURLink
- Company verification: TURLink describes its business as developing data-link systems for unmanned aerial, ground and maritime vehicles.
- Company verification: Its corporate page places its operations in the Ankara Aerospace Organized Industrial Zone.

135. Products | TURLink
- Company verification: TURLink's official catalog lists branded SAV-family data-link modems, including SAV D0214 and SAV ADV, alongside ground controllers and tracking systems.

136. BAYKAR Technology | Avionics/Subsystems
- Company verification: Baykar's official avionics catalog lists Bayraktar Digital Communication Link, Mini UAV Video Link and Digital Video Link.
- Company verification: The catalog presents named communication and video-link subsystems, supporting participation beyond a generic aircraft-manufacturer description.

137. Products - Creomagic
- Company verification: Creomagic's official airborne catalog offers CreoAir Light for small UAVs and multirotor platforms.
- Company verification: The same catalog positions CreoAir HP for UAS and CreoAir HP MIL for larger airborne platforms, including ISR drones.

138. ISRAEL at IDEX 2025
- Company verification: The Israeli Ministry of Defense's IDEX 2025 directory identifies Creomagic Ltd. and describes its airborne MANET communications business.
- Company verification: The directory identifies Orbit Communication Systems Ltd. within the Israeli supplier delegation and describes airborne communications for unmanned platforms.

139. Airborne Satcom | Orbit Communication Systems
    - Company verification: Orbit's official airborne SATCOM catalog expressly includes UAS applications for its MPT terminal family, including MPT xx.xx Ku and MPT xx.xx.
140. Connectivity for BLoS Missions | Defense Aviation | Gilat
    - Company verification: Gilat's official Air portfolio markets airborne SATCOM connectivity for unmanned vehicles.
    - Company verification: Its unmanned-terminal portfolio names Viper Ka, BlackRay Airborne and MLT xx.xx.
141. Gilat Receives over $11 Million Defense Contract from a Leading UAV Company - Gilat
    - Company verification: Gilat's company announcement reports a defense contract from an unnamed UAV company, providing a customer-side business connection without establishing market share.
142. Products List - Thuraya Mobile Satellite Communications Company
    - Company verification: Thuraya's official catalog lists T220 System For UAV as a dedicated satellite terminal for UAV communications, telemetry and beyond-line-of-sight connectivity.
143. About Us - Thuraya Mobile Satellite Communications Company
    - Company verification: Thuraya maintains an official corporate overview identifying its mobile satellite communications operating business.
144. The Smartellite™ Terminal Product | hiSky
    - Company verification: hiSky's official product page lists the Smartellite satellite-terminal family, a hub and network management system.
    - Company verification: This inspected record supports satellite-product identity, but does not establish a specific current UAV offering.
145. EDGE to Supply Intelligence Capabilities to the UAE Armed Forces in AED 4 Billion Deal
    - Company verification: EDGE's February xx.xx 2023 announcement reports a UAE Armed Forces contract for tactical communications and data-link solutions across air, maritime and land applications.
    - Company verification: The page identifies EDGE Group PJSC's Abu Dhabi head office; it does not identify a drone-specific offering or UAV contract allocation.
146. We Signed a Memorandum of Understanding (MoU) with Sinan Advanced Industries! - CTech
    - Company verification: CTech announced a communications-related memorandum of understanding with Sinan Advanced Industries on October xx.xx 2025.
    - Company verification: The announcement identifies Sinan Advanced Industries as an Oman-based defense and aerospace business and a communications-cooperation counterparty.
    - Company verification: The record establishes announced cooperation, not a marketed or delivered UAV-link product.
147. CTech, Hamad Bin Khalifa University, and Nardan Motor Join Forces in Qatar for Next-Generation Satellite Communication Technologies - CTech
    - Company verification: CTech's January xx.xx 2026 announcement names cooperation with Hamad Bin Khalifa University and Nardan Motor in Qatar for next-generation satellite communications.
    - Company verification: The dated announcement names Nardan Motor as a counterparty in a Qatar satellite-communications initiative.
    - Company verification: The announcement does not establish Nardan Motor's independent drone-link supply, authorization or current sales.
148. COMMUNICATION SOLUTIONS - S-PLANE Automation
    - Company verification: S-PLANE markets communication solutions for unmanned aircraft, combining TRACKER+, airborne/ground data terminals and third-party line-of-sight or satellite links.
    - Company verification: The offering page provides a Somerset West, South Africa business address.
149. Ground Control System for Drones - Drone Antenna Tracker
    - Company verification: Nextech's official product catalog presents a branded drone ground-control system and antenna-tracker offering associated with drone data and video connectivity.

150. MIS Digital Catalogue 2022
    - Company verification: Milkor's 2022 official catalog offers data-link and radio communication equipment and discusses communications within its unmanned-system electronics portfolio.
    - Company verification: The catalog includes satellite communications as a offered system option; it does not establish present product-specific sales.
151. ALTI UAS Launches Complete UAV Ground Control and Command Station Inbox x
    - Company verification: A July xx.xx 2018 announcement records ALTI's launch in Knysna, South Africa of a packaged UAV ground-control system incorporating control, telemetry, data and video links.
    - Company verification: This is evidence of a dated product launch, not current availability.
152. AVNON GROUP - DEFENCE & HLS TECHNOLOGY SOLUTIONS
    - Company verification: AVNON GROUP's own portfolio page describes ALTI UAS as its subsidiary based in Knysna, South Africa, supplying unmanned aircraft systems.
    - Company verification: The inspected subsidiary statement is undated.
153. Elistair - Station d'alimentation Safe - T 2.2 - Medina Street Group
    - Company verification: Medina Street Group's Moroccan catalog lists Elistair Safe-T xx.xx and advertises tethered data-link options.
    - Company verification: The listing establishes advertised regional channel availability, not completed sales or local production.
154. YANGDA Technical Support Team Successfully Conducts 5-Day Training on Sky Whale VTOL Drone System in Kenya - YANGDA
    - Company verification: YANGDA's February xx.xx 2025 announcement documents a Nairobi business-support event for its Sky Whale UAV package.
    - Company verification: The announced package includes Videopass-N60 video/data-link equipment and a ground-control station.
155. RAAD Dynamics - Decisive Advantage in Air & Cyber
    - Company verification: RAAD Dynamics identifies Cairo, Egypt as its headquarters and describes integrated aircraft, data-link and communications activity.
    - Company verification: Its named RAAD portfolio is presented as development/R&D programs rather than established marketed products.
156. Groupe TELNET
    - Company verification: TELNET's official French corporate material describes a Tunisian drone program begun in 2018 and a PHOENIX unveiling in June 2020.
    - Company verification: This supports the corporate drone-program lead, not current data-link ownership or merchant-link availability.
157. Iroko UAV - Terra Industries
    - Company verification: Terra Industries publicly presents Iroko UAV in a dedicated business/product page.
    - Company verification: The record supports a named aircraft offering; direct link-supplier attribution remains unresolved.
158. Archer VTOL - Terra Industries
    - Company verification: Terra Industries publicly presents Archer VTOL in a dedicated business/product page.
159. Briech UAS - Africa's Premier Unmanned Aerial Systems Manufacturer
    - Company verification: Briech UAS describes itself as a Nigerian unmanned-system manufacturer established in 2021 and based in Kuje, Abuja.
    - Company verification: Its business description establishes a regional OEM identity, but not ownership of a named drone data-link offering.
160. DL-6000 | HENSOLDT
    - Company verification: HENSOLDT's DL-xx.xx product page explicitly describes video and telemetry communications from unmanned airborne platforms to ground centers.
    - Company verification: The product page establishes UAV-specific offering participation that the earlier country-hub record alone did not resolve.

161. HENSOLDT Annual Report 2021 - Financial Statements
    - Company verification: HENSOLDT's 2021 financial statements report acquisition of Tellumat's ATM and Defence business units and their integration into HENSOLDT South Africa.
    - Company verification: This supports retaining the acquired portfolio under the existing HENSOLDT identity rather than adding a duplicate Tellumat supplier row.
162. About Shenzhen Suntor Technology Company Introduction
    - Company verification: Identifies Shenzhen Suntor Technology Co., Ltd. as the supplier and gives a Shenzhen, China business address.
    - Company verification: Describes airborne radios within its communications portfolio.
163. CD30NMT-V3 Drone Video Transmission Radio
    - Company verification: Markets CD30NMT-V3 as a drone video-transmission radio with airborne and ground equipment carrying video and data.
164. Advanced UAV Communication Products Collection - LinkAV
    - Company verification: Presents a UAV communication-product collection under the LinkAV supplier identity.
165. About Us - Iwave Communications Co., Ltd.
    - Company verification: Identifies the IWAVE business and describes wireless communication products and OEM modules for UAVs and other unmanned systems.
166. Drone Video Transmitter Factory, Suppliers - China Drone Video Transmitter Manufacturers
    - Company verification: Publishes a dedicated drone video-transmitter product category under IWAVE's supplier identity.
167. About CUAV - CUAV
    - Company verification: Identifies CUAV's UAV business and describes wireless data-link, image-link and digital-link product portfolios.
168. Nomad Dual 1-watt Gemini Xrossband ExpressLRS Module - RadioMaster RC
    - Company verification: Lists the Nomad ExpressLRS transmitter module as a RadioMaster RC-branded commercial product.
169. 通訊模組 | 星協系統科技有限公司
    - Company verification: Lists WPC-branded airborne and ground drone communication modules, including ELRS and mesh product families.
    - Company verification: Identifies WPC Systems Ltd. and provides a New Taipei City, Taiwan business address.
170. About & Contact | HiDes Technology
    - Company verification: Identifies the HiDes business and Taiwan operating locations.
    - Company verification: Describes its unmanned-vehicle link portfolio, including ETL-210A and FV-series offerings.
    - Company verification: Identifies HiDes, Inc. in the company page's legal footer.
171. ETL-210A - 300+ km COFDM Data Link | HiDes Technology
    - Company verification: Markets ETL-210A as a bidirectional data-link transceiver for UAV and USV applications.
    - Company verification: Describes UAV video and command/control connectivity as a commercial application.
172. KTL 通訊設備系列-田屋科技股份有限公司
    - Company verification: Lists AVIX's KTL communication-module family and named UVN product variants.
    - Company verification: Describes the family as combining data and image transmission.
173. AVIX Philosophy-田屋科技股份有限公司
    - Company verification: Uses AVIX as the company's official English operating name and describes its UAV-system business.
    - Company verification: The associated company materials identify the native legal identity as 田屋科技股份有限公司.

174. Data Patterns (India) Limited - Investor Presentation / Q4FY26 - May 2026
   - Company verification: Identifies Data Patterns (India) Limited in its May 2026 investor presentation.
   - Company verification: Describes communications-system activity and radio-relay capabilities for airborne platforms/UAVs.
175. Data Patterns corporate presentation (AboutDP.pdf)
   - Company verification: Identifies a beyond-line-of-sight satellite data-link program for the RUSTOM UAV within Data Patterns' corporate communications portfolio.
   - Company verification: The older presentation does not establish current product availability or recent sales.
176. DATA PATTERNS | Contact
   - Company verification: Identifies Data Patterns (India) Ltd., its corporate identifier and Chennai corporate office.
177. 送信機 | Sky Buddy by Futaba
   - Company verification: Lists Futaba FMT-series transmitters and associated receivers in its drone-facing product catalog.
   - Company verification: Describes bidirectional communications that return sensor information from unmanned aircraft.
   - Company verification: Includes lifecycle-related repair qualifications rather than establishing availability of every listed model.
178. Network | Futaba Corporation
   - Company verification: Identifies Futaba Corporation's Japan headquarters and radio-control business.
   - Company verification: Lists a Japanese sales function for drone-related products.
179. ドローン向け上空 LTE SIM なら上空電波パッケージ | DJI 対応 | KDDI スマートドローン
   - Company verification: Markets KDDI SmartDrone's dedicated aerial LTE communications package, including drone-facing SIM connectivity.
180. Establishment of KDDI SmartDrone Inc. | 2022 | KDDI Corporation
   - Company verification: Establishes KDDI SmartDrone Inc.'s formation on January xx.xx 2022 and KDDI's xx.xx% ownership at formation.
   - Company verification: Describes the transfer of KDDI's drone business and its cellular-enabled remote-flight service role.
181. LTE 上空利用プラン | 料金・割引 | NTT ドコモ
   - Company verification: Publishes NTT DOCOMO's LTE aerial-use tariff page.
   - Company verification: The retrieved page establishes the named aerial-connectivity plan but does not resolve detailed current drone-service terms.
182. JRC REVIEW No.77 2026 Technical Reports｜JRC（Japan Radio Co.,Ltd.）
   - Company verification: Identifies Japan Radio Co., Ltd. and reports that JRC built a drone communications system for a 2024 demonstration in Nagano Prefecture.
   - Company verification: Describes aircraft-to-ground telemetry and control communications at the business-category level.
   - Company verification: The record establishes demonstration activity, not current marketed availability.
183. Macgio: Boutique IoT, AI & Secure Communication Solutions | Macgio
   - Company verification: Identifies Macgio LLP, a Singapore business address and a publicly stated entity identifier.
   - Company verification: Describes drone technology and encrypted data-link activity within its business offering.
   - Company verification: Also emphasizes CUAS connectivity, leaving aircraft-data-link participation qualified.

184. News - ST Engineering Highlights Advanced Defence Capabilities
    - Company verification: ST Engineering's February xx.xx 2026 announcement identifies the GEMINI-X airborne datalink among newly announced offerings.
    - Company verification: The same announcement establishes unmanned-system and manned-unmanned integration activity.
    - Company verification: The announcement does not establish that GEMINI-X is a marketed drone-specific link.
185. Communications
    - Company verification: Identifies Viettel High Tech's communications-equipment business and its official communications catalog.
    - Company verification: The rendered retrieved content did not establish the indexed UCX29A UAV product entry.
186. Drone Supply Chain Solutions | Aerora Technology
    - Company verification: Presents Aerora Technology's drone-solutions offering, including remote data links and ground-control stations.
    - Company verification: This offering page does not independently establish the production country of a particular link product.
187. SIYI MK15 Mini HD Handheld Ground Station Enterprise Smart Controller with 5.5 Inch LCD Touchscreen 1080p 60fps FPV 180ms Latency for UAV UGV 15KM CE FCC KC
    - Company verification: SIYI's official shop lists the MK15 handheld ground station for UAV applications with digital image transmission.
    - Company verification: The listing provides a commercial offering route but does not independently establish every advertised regulatory certification.
188. Cubepilot products | AERMATICA3D
    - Company verification: AERMATICA3D identifies itself as an official CubePilot distributor and system integrator.
    - Company verification: Its CubePilot product material provides channel corroboration for the CubePilot portfolio, including HereLink HD-video products.
    - Company verification: The channel record does not resolve CubePilot's supplying legal entity or Australian sales.
189. Producto U-RadioLink - Airelectronics
    - Company verification: Offers U-RadioLink as a command-and-control data-link accessory in OEM, boxed and complete-package commercial formats.
190. Technology - Airelectronics
    - Company verification: Publicly offers licensing of its proprietary UAV autopilot technology.
    - Company verification: The record supports a UAV technology business; it does not establish a communication-IP licensing agreement.
191. Skynode X - The Best All-in-One Solution For Autonomous Robots | Auterion
    - Company verification: Markets Skynode X to drone manufacturers as an integrated flight controller, mission computer and LTE-connected avionics product.
    - Company verification: Provides a direct commercial sales route.
192. Technology | HDZERO
    - Company verification: Identifies Divimath Inc. as the developer and owner of HDZero digital wireless video-transceiver technology for FPV applications.
193. Divimath HDMI VTX - Digital 5.8 GHz HDMI Wireless Link for FPV and Emb - Divimath, Inc
    - Company verification: Markets a Divimath-branded HDMI digital video transmitter for FPV and embedded-system applications.
    - Company verification: The commercial listing identifies compatibility with HDZero and Divimath digital receivers.

194. UXV Technologies Communications - SRM Airside USB
    - Company verification: Offers SRM Airside USB for drone and vehicle compatibility with its swappable-radio ecosystem.
    - Company verification: Official materials present UXV Technologies ApS and UXV Technologies, Inc. within the same commercial presentation.
195. Unleashing the Power of Swappable Radio Modules (SRM): The Future of Connectivity Is Here.
    - Company verification: Markets branded SRM radio integrations for unmanned-system ground-control equipment.
    - Company verification: Names Persistent Systems, Silvus Technologies, Doodle Labs, Microhard and TrellisWare among integrated radio suppliers.
    - Company verification: Named as an upstream radio supplier incorporated into UXV's commercial SRM ecosystem.
196. Successful Flight Operations Conducted Between UTM System, Blue UAS Platforms
    - Company verification: A government account identifies Somewear Node transporting drone telemetry during a June 2024 event.
    - Company verification: The record reports an airborne relay node carried by a Freefly Astro UAV.
    - Company verification: A government account identifies UXV Soldier Robotic Controllers as the ground-control equipment used for the participating aircraft.
    - Company verification: Government material identifies Freefly Astro as the aircraft carrying a range-extending communication relay in the event.
    - Company verification: Government material identifies Skydio aircraft supplying telemetry through the Somewear network.
197. Blue UAS Refresh List, Framework Platforms and Capabilities Selected
    - Company verification: Government material identifies Skyhopper PRO and Pro Lite in the framework selection process and reports addition of Mobilicom components to the framework.
    - Company verification: The record is not product-specific spectrum authorization.
    - Company verification: Government material identifies Auterion Government Solutions Skynode S as selected for verification and cybersecurity review.
    - Company verification: Selection is distinguished from a completed approval.
198. Somewear Labs Delivers Resilience to Global Drone Operations
    - Company verification: An August xx.xx 2024 company announcement describes Node and associated software supplying drone and operator telemetry connectivity.
    - Company verification: Identifies Somewear's San Francisco business location and the activity as a demonstration.
199. About AMP | Advanced Microwave Products | Reno, NV
    - Company verification: Identifies Advanced Microwave Products as a privately owned Reno, Nevada business.
    - Company verification: Describes its UAV-facing video and data transmitter/receiver product lines.
200. UAV/UGV Products | Advanced Microwave Products | Reno, NV
    - Company verification: Provides a dedicated UAV/UGV commercial catalog of data, analog and encrypted transmitters, receivers and transceivers.
201. About Us - BMS, Vislink of Poway LLC
    - Company verification: The official BMS company page describes wireless video/data equipment serving UAV and UGV markets.
    - Company verification: Its displayed page title uses BMS, Vislink of Poway LLC, while the body identifies Broadcast Microwave Services, LLC.
    - Company verification: The refreshed BMS page continues to describe wireless video/data equipment serving UAV/UGV markets. Its displayed branding uses BMS, Vislink of Poway LLC, while its body and address use Broadcast Microwave Services, LLC and identify a Vislink relationship. ([bms-inc.com](https://www.bms-inc.com/about-us))

202. MANET/FANET Solutions | Huneed Technologies
    - Company verification: Markets TRN-M6 and TRN-M30 FANET modules expressly addressing UAV applications.
203. Huneed, Signed the Supply Contract for UAV Core Mission Equipment with KAL
    - Company verification: A December xx.xx 2021 announcement identifies a Korean Air agreement for UAV data-link equipment.
    - Company verification: The supplying role includes communication equipment associated with aircraft and ground units.
204. Radio Link for UAV, UGV and Robotic Platforms | Rebhu Radio CY-2
    - Company verification: Markets CY-xx.xx as an aircraft/ground radio carrying UAV video, telemetry and other mission data.
    - Company verification: The commercial page footer identifies Rebhu Computing Private Limited.
205. Autonomous Systems | Iridium
    - Company verification: Presents dedicated satellite connectivity for autonomous aircraft, including control and mission-data communication use cases.
206. Products & Services
    - Company verification: Markets PLANET xx.xx UAV-L, UAV-F and PLANET xx.xx UAV terminal offerings.
    - Company verification: Its commercial catalog includes PLANET services and satellite-capacity provision.
207. ATMOSPHERE
    - Company verification: Describes its own UAV SATCOM terminal business and PLANET product family.
    - Company verification: Identifies business locations in France, Germany and Spain.
208. Iridium | UAV Navigation
    - Company verification: UAV Navigation's partner record names an ATMOSPHERE Iridium-terminal integration into its flight-control system.
    - Company verification: Its own partner record identifies an ATMOSPHERE satellite-terminal integration within UAV Navigation's avionics business.
209. Data link for UAS baja
    - Company verification: An official catalog presents Indra's UAS data-link offering with aircraft and ground equipment.
    - Company verification: Names Atlante UAS as an application and provides a Spanish commercial contact.
210. Indra is developing the satellite communications system for the long endurance defence drones of the future
    - Company verification: A March xx.xx 2022 announcement identifies development of satellite communications for long-endurance defense drones.
    - Company verification: The announcement does not establish current marketed availability of that terminal.
211. Software-defined, Mission-aligned SATCOM Service
    - Company verification: Markets the HM satellite system and identifies remotely piloted aircraft SATCOM applications.
    - Company verification: Identifies Maryland manufacturing for HM equipment.
212. Hughes Satellite Modems Power BLoS Comms | Hughes
    - Company verification: An official business announcement connects Hughes specialized satellite modems to beyond-line-of-sight communications for remotely piloted aircraft.
213. Team BlackSheep Crossfire Shop
    - Company verification: Markets branded Crossfire drone receivers and transmitter starter sets.
    - Company verification: The inspected catalog marks some variants in stock and others out of stock.
214. LiteRadio 3 Radio Transmitter - BETAFPV
    - Company verification: Markets the LiteRadio xx.xx transmitter for multirotor and aircraft control.
    - Company verification: Identifies ExpressLRS and FrSky versions and a direct purchase route.

215. Data Link - Moneypro Group
    - Company verification: Its commercial catalog offers a data-link product explicitly addressing UAV control, telemetry and video communication.
216. SDL MK22/MK55 22km 55km Wireless Data Link | Integrated HD Video & Telemetry | Professional Industrial UAV
    - Company verification: Markets an SDL MK22/MK55 package for UAV video, telemetry and control transmission under the SoarApex commercial presentation.
    - Company verification: Provides a commercial inquiry route; upstream manufacturing attribution is not established.
217. Unmanned Industries | The Future of UAV Production, Built in America.
    - Company verification: Describes an Austin, Texas custom UAV manufacturing business with in-house activity extending from airframes to data links.
    - Company verification: Does not identify a named separately marketed link product.
218. HOD4stream Product Flyer
    - Company verification: An official brochure offers HOD4stream for UAS remote control and video communication.
    - Company verification: The package includes cellular connectivity and is described as ready for use in Germany.
219. Terms of service - Droniq GmbH
    - Company verification: Droniq's commercial terms reference video-service hours associated with the HOD4stream module.
    - Company verification: The terms identify Droniq GmbH as a contracting business.
220. Skydio Connectivity Solutions
    - Company verification: A 2026 commercial solution sheet presents Skydio Connect point-to-point, cellular, fused-connectivity and external-radio offerings.
    - Company verification: It identifies subscription and separate carrier-data requirements for cellular connectivity.
221. All Drone Components and Autonomy Computers | ModalAI, Inc.
    - Company verification: Markets VOXL communication add-ons, a Microhard modem carrier and a Microhard digital data-link product in its current drone-component catalog.
    - Company verification: ModalAI's commercial catalog names Microhard digital data-link equipment and related branded integration products.
222. VOXL & VOXL 2 Microhard Modem Add-on with USB Hub | ModalAI, Inc.
    - Company verification: Offers a ModalAI-branded VOXL/VOXL xx.xx Microhard modem add-on with a commercial product listing.
    - Company verification: Identified as the radio technology incorporated into ModalAI's VOXL modem package.
223. Astro - US Made Commercial Drone
    - Company verification: Its current Astro business page names Pilot Pro, Doodle Labs radios, cellular connectivity and AuterionOS within the offered integrated aircraft platform.
    - Company verification: Freefly's current Astro commercial offering identifies Doodle Labs as its radio supplier.
224. Monopulse tracking GDT system for UAV applications
    - Company verification: An official company-domain business brochure presents a ground-data-terminal system expressly for UAV data-link applications.
    - Company verification: Provides a company-domain sales contact; current deliveries and the official English legal name are not established.

225. About us - Aeronautics

· Company verification: Aeronautics' corporate page lists Commtact among its subsidiaries and recounts its acquisition, providing direct group-relationship evidence. Ownership percentages are not disclosed. ([aeronautics-sys.com](https://aeronautics-sys.com/about/))

· Company verification: Aeronautics identifies RAFAEL as its parent company. Together with its Commtact subsidiary presentation, this exposes a potential consolidation overlap between retained RAFAEL and Commtact identities. ([aeronautics-sys.com](https://aeronautics-sys.com/about/))

226. Vislink Reports Fourth Quarter and Full Year 2025 Financial and Operational Results

· Company verification: Vislink's March xx.xx 2026 operating-results release describes an AVDS offering engaging legacy BMS customers and addressing aircraft-to-drone and drone-to-drone connectivity. This supports parent-portfolio continuity, not definitive attribution to the protected BMS contracting name. ([vislink.com](https://www.vislink.com/wp-content/uploads/2026/xx.xx/VISL_Q425_FY2025_Earnings_PR_Final.pdf))

227. Vodafone Germany launches platform for commercial drones

· Company verification: Vodafone's June xx.xx 2024 announcement identifies its German DroNet Hub launch with FlyNex and a named DroNet Connect Stream tariff for live drone-to-platform data transmission. This establishes dedicated connectivity participation beyond generic mobile-network capability. ([vodafone.com](https://www.vodafone.com/news/technology/vodafone-germany-launches-platform-for-commercial-drones))

· Company verification: Vodafone identifies FlyNex as its partner in the commercial DroNet Hub launch, establishing a named route to market for the platform business. ([vodafone.com](https://www.vodafone.com/news/technology/vodafone-germany-launches-platform-for-commercial-drones))

228. Informationen nach Art. 3 (2) und (3) Datenverordnung - DroNet Hub, September 2025

· Company verification: The September 2025 DroNet Hub disclosure identifies Vodafone GmbH as the contracting seller and connected-service provider. It describes drone live-video and related service-data categories. ([vodafone.de](https://www.vodafone.de/business/media/informationen-nach-datenverordnung-dronet-hub.pdf))

· Company verification: The disclosure identifies FlyNex GmbH as Vodafone's partner, nonpersonal-data holder and processor of DroNet Hub product and service data, corroborating its continuing platform relationship. ([vodafone.de](https://www.vodafone.de/business/media/informationen-nach-datenverordnung-dronet-hub.pdf))

229. Impressum | FlyNex

· Company verification: FlyNex's official imprint identifies FlyNex GmbH, Leipzig headquarters, a Hamburg branch and the company's stated Leipzig registry number HRB xx.xx. This is company identity disclosure, not an independently retrieved registry determination. ([flynex.io](https://www.flynex.io/de/impressum/))

230. Check Out the New Flynex Platform - FlyNex

· Company verification: FlyNex's February xx.xx 2022 platform announcement describes Connect App as its drone/platform interface enabling live streaming and transmission of collected drone data. It establishes a named software offering, with current version continuity still qualified. ([flynex.io](https://www.flynex.io/en/news/check-out-the-new-flynex-platform/))

231. MissionKeeper

· Company verification: KSI's specific MissionKeeper product page markets proprietary streaming software providing live video and data access from drones and other remote devices, including telemetry functionality. The page is undated. ([ksidatasciences.com](https://ksidatasciences.com/mission-keeper/))

232. FirstNet - August 2021 Newsletter

· Company verification: FirstNet's August 2021 newsletter identifies MissionKeeper by KSI Data Sciences in its app catalog and describes drone video and telemetry streaming. This independently corroborates a historical public-safety channel, not current adoption volume. ([firstnet.com](https://www.firstnet.com/content/dam/firstnet/newsletters/firstnet-vol5-edition8-aug2021.pdf))

233. Privacy Policy - KSI Data Sciences, Inc.

· Company verification: KSI's September 2019 privacy policy explicitly identifies KSI Data Sciences, Inc. as the provider of its mobile/web applications and related commercial-drone services. The dated disclosure supports the official English name but not current registry status or ownership. ([ksidatasciences.com](https://ksidatasciences.com/privacy-policy))

234. WaveStorm Technologies Expands Tactical Communications at CANSEC2026

· Company verification: WaveStorm's attributable CANSEC2026 business post promotes UAV-facing MANET and data-link solutions, identifies its Creomagic partnership and provides a commercial contact. Claimed government evaluations are not independently verified. ([linkedin.com](https://www.linkedin.com/posts/wavestorm-technologies_best-defence-cansec2026-activity-xx.xx-7tNw))

· Company verification: WaveStorm publicly identifies Creomagic as the partner supplying the promoted airborne and ground data-link portfolio, adding a Canadian channel relationship without establishing realized sales. ([linkedin.com](https://www.linkedin.com/posts/wavestorm-technologies_best-defence-cansec2026-activity-xx.xx-7tNw))

235. RockREMOTE UAV | Iridium Certus 100 Satcom | Ground Control

· Company verification: Ground Control markets RockREMOTE UAV as a dedicated satellite terminal for UAV command, telemetry and application-data communications, with an inquiry route and related OEM format. Its footer identifies Ground Control Technologies UK Ltd and Ground Control Systems as trading under Ground Control. ([groundcontrol.com](https://www.groundcontrol.com/product/rockremote-uav/))

· Company verification: Ground Control's RockREMOTE UAV offering explicitly uses Iridium Certus xx.xx adding downstream commercial-offering corroboration for Iridium's dedicated UAV connectivity role without establishing subscriber or shipment counts. ([groundcontrol.com](https://www.groundcontrol.com/product/rockremote-uav/))

23. Key Experts

[redacted] Organizations such as BT Group, ASTM International, ArduPilot, and the listed civil aviation authorities provide professional perspectives relevant to connectivity access, interoperability, qualification, and commercial deployment. The listed country affiliations bring perspectives from North America, Latin America, Europe, Africa, the Middle East, and Asia-Pacific, contextualizing the Global market without implying that requirements are uniform across jurisdictions.

Table 589. Global Drone Data Link System Market, Key Experts

Name	Professional Role	Organization	Country
Abbas Jamalipour	Professor of Ubiquitous Mobile Networking	The University of Sydney	Australia
Abe Bachrach	Co-Founder and Chief Technology Officer	Skydio	United States
Adam Woodworth	Chief Executive Officer	Wing	United States
Adnan Abu-Mahfouz	Chief Researcher, Internet of Things and Wireless Networks	Council for Scientific and Industrial Research	South Africa
Alon Shalev	Co-Founder and Chief Technology Officer	Elsight	Israel
Andrew Terry	Co-founder and Chief Technology Officer	Morse Micro	Australia
Andrew Tridgell	Core Developer	ArduPilot	Australia
Anish Kurien	Associate Professor, Electrical Engineering	Tshwane University of Technology	South Africa
Anthony Spouncer	Senior Director, Advanced Air Mobility	Inmarsat	United Kingdom
Ashish Bhat	Co-founder and Executive Vice President, Research and Development	ideaForge Technology	India
Assaf Monash	Co-Founder and Chief Technology Officer	D-Fend Solutions	Israel
Babak Daneshrad	Founder and Chief Executive Officer	Silvus Technologies	United States
Basem Shihada	Professor of Computer Science	King Abdullah University of Science and Technology	Saudi Arabia
Bastien Mancini	Co-founder and CEO	Delair	France
Brendan Groves	Vice President of Regulatory and Policy Affairs	Skydio	United States

Table 589 - continued

Name	Professional Role	Organization	Country
Carlos Azurdia-Meza	Professor of Electrical Engineering	Universidad de Chile	Chile
Chau Yuen	Professor, School of Electrical and Electronic Engineering	Nanyang Technological University	Singapore
Chris Day	Co-founder and Chief Technology Officer	Flylogix	United Kingdom
Christoph Raab	Executive Director	Drone Alliance Europe	Belgium
Cüneyd Fırat	Chief Executive Officer	CTech	Turkey
Daniel du Plessis	Director of Marketing and Communications	Milkor	South Africa
Daniel Marfo	Senior Vice President, Africa	Zipline	Ghana
Dany Eshchar	Chief Executive Officer	Orbit Communication Systems	Israel
Dario Valenza	Founder and Chief Technology Officer	Carbonix	Australia
Dave Pankhurst	Director of Drones	BT Group	United Kingdom
David Benavente	Founder and CEO	Embention	Spain
David Holmer	Co-Founder and Chief Technology Officer	Persistent Systems	United States
David W. Matolak	Professor of Electrical Engineering	University of South Carolina	United States
Duran de Villiers	Founder and Director	ALTI Unmanned Aircraft Systems	South Africa
Emerson Granemann	Founder and Chief Executive Officer	MundoGEO	Brazil
Eric A. Brock	Chairman and Chief Executive Officer	Ondas Holdings	United States
Eric Murray	Principal Engineer	Vodafone	United Kingdom
Eric Rutayisire	Founder and Chief Executive Officer	Charis UAS	Rwanda
Frank Wang	Founder and Chief Executive Officer	DJI	China
Giovani Amianti	Founder and Chief Executive Officer	XMobots	Brazil
Greg Tyrrell	Executive Director	Australian Association for Uncrewed Systems	Australia
Gregory S. McNeal	Professor of Law and Public Policy	Pepperdine University	United States
Gustavo Fraidenraich	Professor, School of Electrical and Computer Engineering	Universidade Estadual de Campinas	Brazil

Table 589 - continued

Name	Professional Role	Organization	Country
Hendrik Boedecker	Co-founder and Chief Financial Officer	Drone Industry Insights	Germany
Hennie Kieser	Co-founder and Director	UAV & Drone Solutions	South Africa
Herbert Rubens	Co-Founder and Chief Executive Officer	Persistent Systems	United States
Hüseyin Arslan	Professor of Electrical and Electronics Engineering	Istanbul Medipol University	Turkey
Ismail Guvenc	Professor of Electrical and Computer Engineering	North Carolina State University	United States
Jackie Dujmovic	Founder and Chief Executive Officer	Hover UAV	Australia
Jan-Eric Putze	Chief Executive Officer	Droniq	Germany
Jon Damush	Chief Executive Officer	uAvionix	United States
Jonathan Hesselbarth	Co-founder and Chief Technology Officer	Wingcopter	Germany
José Cândido Silveira Santos Filho	Professor, School of Electrical and Computer Engineering	Universidade Estadual de Campinas	Brazil
José Luiz Rebelatto	Professor of Electronic Engineering	Universidade Tecnológica Federal do Paraná	Brazil
Jörg Dittrich	Unmanned Aircraft Systems Researcher; Chair of JARUS	German Aerospace Center (DLR)	Germany
Kalinka Regina Lucas Jaquie Castelo Branco	Professor, Institute of Mathematics and Computer Sciences	Universidade de São Paulo	Brazil
Kay Wackwitz	Founder and CEO	Drone Industry Insights	Germany
Kim James	Co-founder and Director	Drone Guards	South Africa
Kirill Shilov	Founder and CEO	Sky-Drones Technologies	United Kingdom
Kush Gadhia	Chief Executive Officer	Astral Aerial Solutions	Kenya
Ling Cheng	Professor, School of Electrical and Information Engineering	University of the Witwatersrand	South Africa
Lisa Ellman	Co-Founder and Executive Director	Commercial Drone Alliance	United States
Lorenzo Murzilli	Founder and CEO	Murzilli Consulting	Switzerland
Maria Algar Ruiz	Drone Programme Manager	European Union Aviation Safety Agency	Germany
Meir Kliner	Co-Founder and Chief Executive Officer	Airobotics	Israel
Metin Bayram	President and Chief Executive Officer	TrellisWare Technologies	United States

Table 589 - continued

Name	Professional Role	Organization	Country
Michael De Nil	Co-founder and Chief Executive Officer	Morse Micro	Australia
Michael Oborne	Creator and Lead Developer, Mission Planner	ArduPilot	Australia
Michael Robbins	President and Chief Executive Officer	Association for Uncrewed Vehicle Systems International	United States
Michael Rudolph	Head of Airspace Safety	Dubai Civil Aviation Authority	United Arab Emirates
Miguel Ángel de Frutos	Director and Chief Technology Officer	UAV Navigation	Spain
Mohamed Abdallah	Associate Professor, College of Science and Engineering	Hamad Bin Khalifa University	Qatar
Mohamed-Slim Alouini	Professor of Electrical and Computer Engineering	King Abdullah University of Science and Technology	Saudi Arabia
Mérouane Debbah	Professor and Director of the 6G Research Center	Khalifa University	United Arab Emirates
Nei Brasil	Founder and Chief Executive Officer	FT Sistemas	Brazil
Onofre Trindade Júnior	Senior Professor, Institute of Mathematics and Computer Sciences	Universidade de São Paulo	Brazil
Oren Elkayam	Co-Founder, Chairman and Chief Executive Officer	Mobilicom	Israel
Paul Beard	Founder and Chief Technology Officer	uAvionix	United States
Paul Hellhake	President, Chief Technology Officer and Co-Founder	Rajant Corporation	United States
Philip Butterworth-Hayes	Editor	Unmanned Airspace	United Kingdom
Philip Finnegan	Director of Corporate Analysis	Teal Group	United States
Philip Kenul	Chair, Committee F38 on Unmanned Aircraft Systems	ASTM International	United States
Philip Rowse	Co-founder	CubePilot	Australia
Poppy Khoza	Director of Civil Aviation	South African Civil Aviation Authority	South Africa
Rahul Singh	Co-founder and Vice President, Engineering	ideaForge Technology	India
Ralph Mills	Chief Executive Officer	Paramount Advanced Technologies	South Africa

Table 589 - continued

Name	Professional Role	Organization	Country
Ralph Schepp	Co-founder and Chief Operating Officer	Droniq	Germany
Randy Mackay	Lead Developer, ArduCopter	ArduPilot	Japan
Raviv Raz	Co-Founder and Chief Technology Officer	Percepto	Israel
Reece Clothier	President	Australian Association for Uncrewed Systems	Australia
Richard Demo Souza	Professor of Electrical and Electronic Engineering	Universidade Federal de Santa Catarina	Brazil
Robert Garbett	Founder and CEO	Drone Major Group	United Kingdom
Robert J. Schena	Chairman, Chief Executive Officer and Co-Founder	Rajant Corporation	United States
Roberto José Silveira Honorato	Superintendent of Airworthiness	Agência Nacional de Aviação Civil (ANAC)	Brazil
Rui Zhang	Presidential Chair Professor, School of Science and Engineering	The Chinese University of Hong Kong, Shenzhen	China
Rynier van der Watt	Managing Director	HENSOLDT South Africa	South Africa
Sami Muhaidat	Professor of Electrical and Computer Engineering	Khalifa University	United Arab Emirates
Samuel Baraldi Mafra	Professor and Wireless Communications Researcher	Instituto Nacional de Telecomunicações	Brazil
Samuel Montejo-Sánchez	Wireless Communications Researcher	Universidad Tecnológica Metropolitana	Chile
Samuel Salomão	Co-Founder and Chief Product Officer	Speedbird Aero	Brazil
Selçuk Alparslan	President	Meteksan Defence	Turkey
Selçuk Bayraktar	Chairman and Chief Technology Officer	Baykar	Turkey
Shinji Suzuki	President	Japan UAS Industrial Development Association	Japan
Shlomi Arnon	Professor of Electrical and Computer Engineering	Ben-Gurion University of the Negev	Israel
Silas Udahemuka	Director General	Rwanda Civil Aviation Authority	Rwanda
Sunil Maharaj	Vice-Principal, Research, Innovation and Postgraduate Education	University of Pretoria	South Africa
Tareq Al-Naffouri	Professor of Electrical and Computer Engineering	King Abdullah University of Science and Technology	Saudi Arabia
Thomas Neubauer	Co-founder	Dimetor	Austria

Table 589 - continued

Name	Professional Role	Organization	Country
Thomas Olwal	Professor of Telecommunications Engineering	Tshwane University of Technology	South Africa
Tony Q. S. Quek	Professor, Information Systems Technology and Design	Singapore University of Technology and Design	Singapore
Walid Saad	Professor of Electrical and Computer Engineering	Virginia Tech	United States
Yoav Amitai	Chief Executive Officer	Elsight	Israel
Yong Zeng	Professor, School of Information Science and Engineering	Southeast University	China
Yonghui Li	Professor of Telecommunications	The University of Sydney	Australia
Yossi Segal	Co-Founder and Vice President of Research and Development	Mobilicom	Israel

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