

DRONE DOMINANCE



Industry Day

March 26, 2026

www.dronedominance.mil

THE NATURE OF WAR HAS CHANGED. ACQUISITION MUST FOLLOW.



"We will accept acquisition risk to reduce operational risk." — Secretary of Defense Pete Hegseth

✗ TRADITIONAL ACQUISITION

- Paper requirements
- Timelines measured in years
- Expensive custom builds
- 100% solutions over long time frames

✓ DRONE DOMINANCE

- Live capabilities demonstrated in the field
- Timelines measured in months
- Consumable scale, commercial tech
- 80% solutions now and iterate

PROBLEM: Ground combat forces lack sufficient OWA drones that are low-cost, scalable, and backed by a resilient supply chain.

WHAT IS DRONE DOMINANCE?



\$1.1B



Advanced Market
Commitment

~300K



Small OWA
Drones

4 PHASES



Feb 2026 –
Aug 2027



Buying demonstrated capabilities, not R&D promises. The funding is committed, the demand is real.



Open competition. Warfighters score systems in the field. Rank determines order volume. No incumbency advantage.



Each phase raises the bar on performance, supply chain, and scale while driving unit cost down.



Aligned with EO 14307 — “Unleashing American Drone Dominance.”

KEY PRINCIPLES



"We are adopting new technologies with a 'fight tonight' philosophy." — Secretary Hegseth



Fight Tonight

Buy live capabilities, not paper promises. Timelines in months, not years.



Meritocracy in Action

Rank determines reward. Transparent scoring. No incumbency advantage.



Supply Chain as Weapon System

Resilient sourcing is a critical capability. US & allied nations only.



Scale Drives Affordability

Volume drives unit cost down. Goal: profitable, scaled champions.

TWO KEY GOALS



A Get Drones to the Services at Scale — Now

Enable the services to accelerate development of tactics, techniques, procedures (TTPs) and DOTMLPF integration. Units cannot develop doctrine for weapons they do not have.



B Scale a Resilient Supply Chain to Drive Costs Down

Volume production on a resilient, non-Chinese supply chain drives unit cost down over time. Phase I to Phase IV: unit cost drops significantly as volumes scale.



INTENDED OUTCOME: 3–5 “champion” companies that are profitable, scaled, and selling to DoD at low cost — each slightly differentiated across mission specialties. A healthy industrial base, not a monopoly.

“At the completion of the program, multiple US vendors will have demonstrated the ability to produce capable, low-cost, secure supply chain sUAS at scale.” — RFS

WHAT DRONE DOMINANCE IS NOT



A Technology Demo

This is a production program. We are buying at scale, not evaluating concepts.



The Entire DoD sUAS Program

Many other requirements drive purchases outside DDP. Not the only game in town.



Covering All Drone Types

Focused on small OWA. Scaling this supply chain benefits the broader sUAS ecosystem.



A One-Phase Contract

Four phases through Aug 2027. Each raises the bar. Continuous competition.



A Checkbox Exercise

Supply chain requirements are real and verified. Non-compliant will not advance.



Decided by a Review Board

Operators design scenarios, test systems, and score results. The field decides.

PROGRAM TIMELINE



Every 6 months:
major milestone



Volumes increase
each phase



Unit costs decrease
each phase



Supply chain requirements
tighten each phase



LEARNINGS FROM PHASE I



WHAT WORKED

- Open competition produced differentiation between systems
- Warfighter-scored field events that represented battlefield problems
- Industry responded well on compressed timelines
- We are placing orders



DO BETTER ON

- Faster feedback for vendors – we are working on it
- Use less skilled operators but more training
- Two primary missions selected for different drone sizes
- Don't want folks to train for test but will be clearer regarding battle mission evaluations in future
- Need to get ahead of curve on supply chain compliance
- You tell us what else....



PHASE II: WHAT IS COMING

Phase II procures lethality. Harder tests, contested environments, and a resilient supply chain



Lethality Procurement

Phase II is buying warfighting capability. Systems must demonstrate lethal effectiveness against realistic targets.



Full Counter-UAS Environment

Realistic EW and GNSS denial. Performance in contested spectrum is a key discriminator.



Bifurcated Missions

Long Range Strike (~20km) and Close Quarters (including urban). Compete in one or both.



Cognitive Deload

Multi-drone control, ATR, autonomous navigation. Systems that reduce operator burden stand out.



Harder Supply Chain

Non-Chinese batteries AND motors. NDAA compliance verified. Production delivery test is a hard gate.

SUPPLY CHAIN



Supply chain resilience is a weapon system. Strategic sourcing as a critical capability. Must be able to build and field millions of sUAS if at war with peer adversaries

- DDP requirements will intentionally accelerate statutory NDAA timelines to create demand signals for domestic and allied sourcing
- Matrix of NDAA and other statutory requirements can be hard to understand/untangle
- **We will be publishing phased supply chain migration framework covering components and subcomponents of sUAS alongside Phase II RFS**
- Scaling the sOWA supply chain benefits the broader sUAS ecosystem

PHASE II FLOOR

- Non-Chinese batteries
- Non-Chinese motors

+ other

EACH PHASE GETS HARDER

Deeper domestic sourcing requirements phase by phase

"We are relying on industry to innovate to complete battlefield missions, reduce unit costs and scale production with a preference for systems sourced and manufactured primarily in the United States."

"Vendors may be awarded points for exceeding Blue List/NDAA requirements with US or allied base products."

— Phase I RFS



THE PATH FORWARD



Please give us feedback regarding what you hear today - RFS is coming



Supply chain resiliency and scale is the focus



This is key demand signal from Department of War in sUAS space



The warfighter needs these systems. Speed matters

D R O N E D O M I N A N C E