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DEFENCE INDUSTRY

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- **Section:** Defence Industry / Industria de Defensa
- **Window covered:** 14 November 2026, 15:00 to 15 November 2026, 15:00 Europe/Madrid
- **Compiled from:** the US, European and RoW Defense Industry list briefs, plus aerospace, space and launch items from the R&D brief and `shared/launches.md`. Poland's pause on PURL funding for US weapons is covered in Current Affairs, not repeated here.

Italy says it supports Germany joining GCAP, proposing observer status first

Italy's government said on Saturday, 14 November, that it fully supports Germany's participation in the Global Combat Air Programme (GCAP) and called a *Financial Times* report that Rome had sought to block Berlin "entirely misleading." In a defence ministry statement, Italy said it had proposed that Germany first join as an observer, to ease information-sharing and speed a later path to full membership without putting the programme's timetable at risk, and that it had restated that position at the latest GCAP videoconference of the three partner nations. GCAP is the UK–Italy–Japan effort, led industrially by BAE Systems, Leonardo and Mitsubishi Heavy Industries, to field a next-generation fighter around 2035. Canada became GCAP's first observer in July 2026, according to subsequent reporting.

The Japan Times, reporting on 15 November, noted that German defence minister Boris Pistorius had said earlier this month he expects a decision by the end of March on whether to join GCAP, after Berlin abandoned the Future Combat Air System (FCAS) New Generation Fighter project with France earlier in 2026. Subsequent reporting (The Telegraph, Aviacionline) said a German official had described observer-only status as "unacceptable" because Berlin wants a full workshare, including for Airbus Defence and Space. Berlin is also reported to be weighing a possible alternative partnership with Sweden and Spain (Airbus and Saab). The original Reuters article linked from @F_CEAFE could not be fetched in the briefs (HTTP 401); the same official line was taken from Il Sole 24 Ore, Arab News and The Japan Times.

Why it matters for Europe. After the collapse of Franco-German FCAS, GCAP is the main live path to a European-involved sixth-generation fighter, albeit one anchored in a UK–Japan industrial axis as well as Italy. How Germany enters — or whether it builds a separate project with Sweden and Spain — will shape industrial workshare, timelines, and Europe's long-term air-combat autonomy, in contrast to further reliance on the US F-35.

What to watch. Germany's formal response to observer status; any UK and Japanese comments; Pistorius's end-of-March decision; whether France, Sweden and Spain outline an alternative combat-air path.

Sources

- @F_CEAFE linking Reuters
- Il Sole 24 Ore on the Italian MoD statement
- The Japan Times, 15 November
- Arab News, Reuters text

SpaceX catches a Starship upper stage; Rocket Lab's Electron reaches 100 launches

On 14 November, SpaceX caught the upper stage of Starship Flight 15 in the mechanical arms of the Starbase, Texas, launch tower — the first catch of a Starship upper stage after an orbital flight, about 22.5 hours after liftoff from Pad 2 on 13 November. SpaceX said the ship completed a nominal ascent, deployed 26 Starlink V3 satellites (with contact made on all of them), and, after more than 20 hours on orbit, executed a deorbit burn and a landing flip on three Raptor engines into the tower's arms. The Super Heavy booster did not return to the tower: SpaceX said a boostback burn ended early because of low fuel mass, guidance aborted the catch to an offshore landing zone, and after a landing-burn hover the flight-termination system was triggered. CNBC, reporting the same flight, said the booster exploded before hitting the water in the Gulf of Mexico.

Separately, Rocket Lab announced that Electron's 100th launch — "The Mountain God Rises," at 18:30 on 14 November from Launch Complex 1 in Māhia, New Zealand — successfully deployed iQPS's YAMATSUMI-II synthetic-aperture radar satellite to a 575 km low-Earth orbit. Rocket Lab said Electron has reached 100 launches faster than any other commercially developed rocket. Year-to-date orbital launch figures compiled in CEAFE's `shared/launches.md` as of 15 November 2026 (including the failed ULA Vulcan / Amazon Leo LV-01 of that day), according to Flight Atlas 2026 statistics, put the United States at 157 attempts (~1,893 t to orbit), of which SpaceX accounted for 127 attempts (~1,787 t); China at 81 attempts (~255 t); and Europe's Ariane 6 and Vega C together at 6 attempts (Ariane 6: 4, Vega C: 2; ~60 t). Counts differ slightly between trackers.

Why it matters for Europe. A successful orbital catch of a Starship-class upper stage, even with a failed booster recovery, is a step-change in reusable heavy-lift cadence that Europe does not yet match, with direct implications for transatlantic launch dependence and constellation deployment. Electron's 100th flight underscores a responsive small-launch market in which European operators also compete. The year-to-date gap in mass to orbit remains very large.

What to watch. SpaceX's investigation of the early boostback; the next attempt at a dual booster-and-ship catch; European launcher and institutional reactions; Neutron as Rocket Lab's medium-lift follow-on.

Sources

- SpaceX Flight 15 recap
- SpaceNews, Jeff Foust, 14 November

- CNBC
- Rocket Lab release on Electron's 100th launch
- Flight Atlas 2026 statistics



SpaceNews photograph of the Starship upper stage returning to the Starbase tower.

ASELSAN's EJDERHA system said to disable 51 drones at once; CEO says serial production has begun

ASELSAN and its CEO, Ahmet Akyol, on 15 November publicised a demonstration of EJDERHA, a high-power electromagnetic (HPEM) counter-UAV system, held at the company's Gölbek firing and test centre to mark ASELSAN's 51st anniversary. In a written company statement quoted by Anadolu Agency, ASELSAN said the system first disabled two different cable-controlled drones at a range of about 1,000 metres, then, in a second phase, simultaneously disabled 51 drones launched together, in seconds and without missiles or munitions. Akyol called it the first system in the world to down 51 drones with a single command without a missile or munition, placed EJDERHA in the drone-defence layer of Türkiye's ÇELİKKUBBE ("Steel Dome") air-defence architecture, and said the system has entered serial production. ASELSAN gave no production volumes, delivery timetable or recipient units. ADDR Magazine, repeating the company line, noted that a demonstration does not guarantee the same effect under all operational conditions.

Why it matters for Europe. Cheap massed drones have exposed the cost and magazine-depth limits of missile-based air defence in Ukraine and the Middle East. A fielded Turkish HPEM effector would add a non-NATO, munition-free layer that European forces and industry will be compared against.

What to watch. Official delivery or inventory announcements; production quantities and recipient units; any export interest; independent technical commentary on the "world first" and serial-production claims.

Sources

- ASELSAN official post
- Ahmet Akyol
- Anadolu Agency, 15 November
- ADDR Magazine

China flight-tests a large unmanned cargo aircraft and a 10-tonne electric airliner

On 14 November, Air White Whale's W5000 — described by the company and Chinese state media as the world's largest unmanned cargo aircraft — completed a roughly 30-minute technical verification flight at Otog Front Banner Oljoq Airport in Ordos, Inner Mongolia. CGTN and Global Times, citing the company, reported a maximum take-off weight of 10.8 tonnes, a 5-tonne payload, a 5.8-tonne empty weight, a 2,600 km range and more than 65 m^3 of cargo volume, with all 220,000 components said to be domestically produced. The company reported 835 letters of intent and a target of commercial service by the end of 2027; airworthiness certification is still under way. "World's largest" is the company's and state-media characterisation, by payload, and was not independently verified in the briefs. CGTN and Global Times are Chinese state media; their claims are reported as such.

The same day, COMAC's CE-25A, its first electric commercial aircraft, made its first crewed "intelligent" flight in Binzhou, Shandong, carrying two pilots and a flight-test engineer (16 minutes 38 seconds airborne, 60.4 km), after a first unmanned flight on 2 February 2026. Xinhua, citing COMAC, said the 19-seat aircraft has a 10-tonne maximum take-off weight, a 300 km/h cruise at 2,400 m and a 400 km range, with distributed electric ducted-fan propulsion; partners include CATL and Shanghai Jiao Tong University. China's civil aviation authority has accepted a type-certificate application.

Why it matters for Europe. A large indigenous unmanned cargo aircraft and a battery-electric regional airliner are markers of Chinese aerospace and dual-use industrial autonomy — relevant benchmarks for European UAV, cargo-drone, electric-aircraft and battery efforts, and for export-control and certification debates.

What to watch. W5000 airworthiness progress toward end-2027 service; whether the 835 letters of intent convert to firm orders; CE-25A type certification; any European or EASA reaction to large unmanned cargo types.

Sources

- CGTN, 14 November (Chinese state media)
- Global Times, 15 November (Chinese state media)
- Xinhua on the CE-25A (Chinese state media)
- @F_CEAFE repost of Global Times on the W5000

France and India hold their first DRDO–DGA Joint Steering Group

Naval Group India reposted an Indian Defence Research and Development Organisation (DRDO) statement on the first Joint Steering Group meeting between DRDO and France's Direction générale de l'armement (DGA). According to DRDO, the meeting was held in France on 13–16 October 2026 to deepen defence research and development cooperation, following a Technical Arrangement between India and France signed in New Delhi on 20 November 2025. Talks covered aero engines, wind-tunnel testing, naval technologies, defence innovation and academic cooperation. A follow-up review was held on 13 November 2026 at DRDO Bhawan in New Delhi, co-chaired by Dr Chandrika Kaushik, director general (Production Coordination & Services Interaction), DRDO, and Brigadier General Mickael Le Cam, DGA director for Asia-Pacific.

Why it matters for Europe. France is using the DGA–DRDO channel, and companies such as Naval Group, to lock in long-term co-development with India in engines, naval systems and testing infrastructure. That is part of Europe's effort to build extra-European defence-industrial partnerships that can share cost and open markets — while also placing French industry in a competitive field that includes other European and non-European suppliers.

What to watch. A joint communiqué with project-level detail (engine or naval demonstrators, wind-tunnel access, academic calls); any Naval Group follow-up on drones, propulsion and underwater systems.

Sources

- Naval Group India repost of DRDO
- DRDO original
- PIB, Technical Arrangement, 20 November 2025

US Army releases footage of a high-energy laser in use on the southern border

AeroVironment reposted, in this window, a clip described as freshly published US Defense Department footage of a high-energy laser operated on the US–Mexico border by soldiers of 2nd Battalion, 327th Infantry Regiment, 101st Airborne Division, assigned to Joint Task Force–Southern Border. Independent coverage of the same unit and system identifies it as the Army Multi-Purpose High Energy Laser (AMP-HEL), a vehicle-mounted 20 kW counter-drone weapon based on AeroVironment's LOCUST laser, used in a 2 November 2026 training exercise near Fort Hancock, Texas, under Operation Ardent Vanguard. US Northern Command has previously said AMP-HEL had downed 11 cartel-linked drones by early September, after first combat use on the border in late August; those figures are official US claims. An FAA safety assessment concluded in April, after a February airspace incident near El Paso, that the systems do not increase risk to the flying public, according to Defence Blog.

Why it matters for Europe. Cheap, magazine-deep directed-energy counter-UAS is directly relevant to Ukraine and to NATO's eastern flank, where interceptor stocks are under strain. Operational use of a fielded US 20 kW laser, even in a homeland-border role, is a data point on reliability and industrial maturity, against which European programmes such as the UK's DragonFire will be compared.

What to watch. Any new official engagement figures; whether AMP-HEL or LOCUST variants are offered to European or Ukrainian customers; progress of European directed-energy programmes.

Sources

- AeroVironment repost
- Defence Blog on AMP-HEL training
