

Europe & CIS Combat System Integration Market By Application (Land Based, Naval, Airborne), By Platform (Large Combat Ships, Medium Combat Ships, Small Combat Ships, Submarines, Fighter Aircraft, Combat Helicopters, Others), By Country, Competition, Forecast & Opportunities, 2020-2030F

Market Report | 2025-09-30 | 135 pages | TechSci Research

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Report description:

Market Overview

Europe & CIS Combat System Integration Market was valued at USD 4.33 Billion in 2024 and is expected to reach USD 7.39 Billion by 2030 with a CAGR of 9.32% during the forecast period. The Combat System Integration market is experiencing growth as militaries adopt advanced multi-domain platforms that require seamless integration of weapons, sensors, and communication systems to achieve superior operational efficiency. Growth is driven by the increasing demand for network-centric warfare capabilities, enabling real-time situational awareness and coordinated operations across land, air, and naval domains. Continuous investments in defense research and development are fostering innovation in modular, scalable, and interoperable combat systems, while automation, artificial intelligence, and advanced data analytics are enhancing decision-making and threat response.

Market Drivers

Growing Demand for Network-Centric Warfare

The demand for network-centric warfare is a key driver in the combat system integration market. Modern militaries require real-time data sharing, coordinated command, and synchronized operations across land, sea, air, and space domains. Integrating sensors, communication systems, and weapon platforms into a unified network enhances situational awareness, improves decision-making speed, and reduces operational risks. Command centers can access actionable intelligence from multiple platforms, enabling precision strikes and rapid threat neutralization. The emphasis on interoperability across heterogeneous systems pushes defense organizations to adopt modular and scalable integration solutions that can be updated as new technologies emerge. This trend drives investment in secure, high-bandwidth communication networks, as well as in software

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frameworks capable of managing complex data flows. For instance, at the 2025 NATO Summit, allies pledged to raise defense spending to 5% of GDP by 2035, with 3.5% for core defense and 1.5% for cybersecurity and infrastructure, marking a sharp increase from the prior 2% benchmark. This shift channels consistent, multi-year funding into vulnerability management, incident response, secure-by-design software, and defense-specific cloud platforms, while boosting ICT investments projected at \$11B in Europe in 2025. The EU's \$926B ReArm Europe plan includes \$1.6B (2025-2027) for defense industry strengthening.

Key Market Challenges

System Interoperability and Complexity

Managing interoperability and system complexity remains a major challenge in combat system integration. Modern platforms consist of diverse subsystems, including sensors, communication networks, and weapons, often sourced from multiple vendors with varying technical standards. Ensuring seamless interaction between legacy systems and cutting-edge technologies requires sophisticated software frameworks and rigorous testing protocols. Integration of multi-domain capabilities must account for timing, data compatibility, and command synchronization to avoid operational failures. Complex systems are prone to faults, communication bottlenecks, and cybersecurity vulnerabilities, which can undermine mission effectiveness.

Key Market Trends

Integration of Unmanned and Autonomous Systems

Unmanned and autonomous systems are increasingly integrated into combat platforms to enhance operational flexibility and reduce risk to human personnel. Drones, robotic vehicles, and autonomous naval systems provide real-time intelligence, surveillance, and reconnaissance, feeding data into integrated command networks. Coordination between manned and unmanned assets improves situational awareness, enabling faster and more precise responses to threats. Integration of autonomous systems requires advanced software frameworks, communication protocols, and decision-support algorithms, promoting innovation in AI-driven command platforms. The trend toward unmanned integration also drives modular system designs, allowing quick adaptation to new operational requirements. Incorporating autonomous capabilities enhances mission scalability and operational resilience, creating new opportunities for advanced combat system solutions. For instance, European Defence Fund allocated \$1B to 62 projects spanning drones, unmanned systems, hypersonic defense, AI, and rotorcraft. Major awards: \$110M ENGRT II, \$55M iMUGS2, \$31M Euroswep, \$85M hypersonic defense, \$39M Scepter, \$38M Beast, \$52M Citadel Range, \$33M Fasett2, and \$32M Ninja2. SMEs secured 27% of funding, Ukraine joined for the first time, and EDF has spent half of its \$8.8B 2021-2027 budget.

Key Market Players

- [] Lockheed Martin Corporation
- [] Leonardo S.p.A.
- [] BAE Systems Plc
- [] QinetiQ Limited
- [] Saab AB
- [] Thales S.A.
- [] ICI Services Corporation
- [] Kongsberg Gruppen ASA
- [] Elbit Systems Ltd
- [] Bharat Electronics Limited (BEL)

Report Scope:

In this report, Europe & CIS Combat System Integration Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

- [] Europe & CIS Combat System Integration Market, By Application:
 - o Land Based
 - o Naval
 - o Airborne
- [] Europe & CIS Combat System Integration Market, By Platform:
 - o Large Combat Ships
 - o Medium Combat Ships

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- o Small Combat Ships
- o Submarines
- o Fighter Aircraft
- o Combat Helicopters
- o Others

-□ Europe & CIS Combat System Integration Market, By Country:

- o Germany
- o Russia
- o France
- o Spain
- o Italy
- o United Kingdom
- o Poland
- o Rest of Europe & CIS

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in Europe & CIS Combat System Integration Market.

Available Customizations:

Europe & CIS Combat System Integration Market report with the given market data, TechSci Research offers customizations according to the company's specific needs. The following customization options are available for the report:

Company Information

-□Detailed analysis and profiling of additional market players (up to five).

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