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Global Digital Tower Solution Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Digital Tower Solution market size is expected to reach $ 1069 million by 2032, rising at a market growth of 10.5% CAGR during the forecast period (2026-2032).

Digital Tower Solution refers to a safety-critical combination of specialised software, visual surveillance equipment, communication infrastructure, controller working positions and professional implementation services used to support aerodrome air traffic control and related airport surface operations. The solution captures real-time views of runways, taxiways, aprons and surrounding airspace through fixed panoramic cameras, pan-tilt-zoom cameras, infrared sensors, audio devices and meteorological sensors, and transmits the information to an on-site digital tower or a geographically separate control centre through resilient low-latency networks. Core functions generally include panoramic video processing, image enhancement, target detection and tracking, flight-data presentation, surveillance-data fusion, voice communication, electronic flight strips, airfield-lighting control, recording and replay, cybersecurity and system-health monitoring. The research scope focuses on operational single-airport digital towers, multi-airport remote tower centres, digitally enhanced conventional towers, contingency facilities and deployable systems, together with the integration, certification support, maintenance and software-upgrade services directly associated with these platforms. This definition is consistent with the technology-mediated aerodrome observation concepts addressed by EASA and ICAO and with the optical-system performance framework established by EUROCAE.

Key Findings

Europe remains the largest regional market and the principal centre of

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operational deployment

Regional and low-traffic airports represent the most established commercial application

The validated core supplier group contains approximately eleven integrated platform providers

The broader supply pool contains around fifty platform subsystem service and potential suppliers

Multi-airport centres and digital enhancement of major airports are the principal expansion directions

Market Trends

Digital Tower Solution is evolving from an alternative to a physical control tower into a broader digital operating platform for airport traffic management. Early projects were mainly designed for individual regional airports, whereas current investments increasingly support multi-airport control centres, hybrid operations, contingency facilities and digital enhancement at larger airports. Product development is shifting from basic panoramic video towards multi-sensor data fusion, automated object detection, augmented information overlays, AI-supported operational analysis and open interfaces with surveillance, flight-data, meteorological and airfield systems. At the same time, customers are placing greater emphasis on cybersecurity, deterministic latency, system redundancy, human-machine interface design and performance under night-time or adverse-weather conditions. Operational evidence is also becoming more substantial: Kongsberg reported that 14 Norwegian airports were controlled from the Bodø remote tower centre by April 2025, while further airports are scheduled to join; Saab announced new European airport selections during 2025; and Frequentis continues to expand its installed airport base. These developments indicate that the industry is moving from isolated demonstrations towards repeatable deployment models, although adoption remains gradual because each project requires local safety validation and regulatory approval.

Market Dynamics

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Drivers

The main demand driver is the need for airport operators and air navigation service providers to modernise ageing tower infrastructure while improving operational flexibility and resilience. Multi-airport remote tower centres can consolidate technology, supervision and qualified personnel, making them particularly relevant to regional airports where traffic volumes may not justify separate full-scale facilities. Larger airports are adopting digital visual systems to cover blind areas, strengthen contingency capability and improve coordination across runways, aprons and remote stands. Defence organisations also value deployable systems that allow controllers to operate from protected or geographically separated locations. The progressive development of regulatory guidance and technical standards is another important enabler. EASA updated its remote aerodrome air traffic services guidance in January 2026, while EUROCAE's ED-240 series and China's MH/T 4056-2024 and MH/T 4057-2024 standards provide increasingly detailed requirements for optical systems and tower automation.

Restraints

Market development is constrained by high initial engineering costs, airport-specific integration requirements and lengthy approval procedures. A Digital Tower Solution must demonstrate reliable performance across different weather, lighting, traffic and communications conditions, and the safety case normally covers both equipment performance and operational human factors. Airports with relatively new conventional towers may find the financial case less compelling unless the project also provides capacity, resilience or multi-airport benefits. Implementation can also require upgrades to network infrastructure, surveillance feeds, voice communications, power redundancy and control-centre facilities. Because the systems are safety critical, customers are generally reluctant to adopt unproven suppliers or replace established interfaces rapidly, resulting in long sales cycles and conservative procurement decisions.

Opportunities

The largest opportunity lies in expanding the technology beyond the initial regional-airport use case. Existing remote tower centres can add airports and control modules incrementally, creating recurring demand for cameras, software licences, workstations, network capacity and maintenance. Major hubs offer opportunities for digital enhancement, remote apron management, supplementary visual coverage and

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independent contingency centres without requiring the immediate replacement of the physical tower. Other potential markets include military airbases, temporary airfields, disaster-response operations, island airports and locations with difficult visibility or infrastructure constraints. AI-enabled detection, runway and taxiway monitoring, operational analytics and integrated digital-airside platforms may increase the software and lifecycle-service share of project value. Open system architectures also create entry points for specialist suppliers of sensors, communications, displays, recording systems and cybersecurity functions.

Challenges

The principal long-term challenge is converting technically successful trials into repeatable, financially sustainable operational programmes. Regulations, operating procedures and liability frameworks continue to vary between jurisdictions, limiting direct replication of a certified project in another market. Multi-airport simultaneous control creates additional human-factors and workload questions, while increased dependence on digital networks raises cybersecurity and service-continuity risks. Suppliers must maintain compatibility with airport systems that have different ages, interfaces and ownership structures, and they are expected to provide support throughout long infrastructure lifecycles. The limited number of reference projects also makes performance comparison and standardised pricing difficult. As AI functions become more prominent, vendors will need to demonstrate that automated alerts are reliable, explainable and appropriately integrated into controller decision-making without creating distraction, automation bias or excessive false alarms.

Value Chain Analysis

The upstream layer of the Digital Tower Solution value chain consists of high-definition optical sensors, PTZ and infrared cameras, microphones, weather sensors, professional displays, computing servers, network equipment, control-room hardware and cybersecurity components. Most of these elements are available from established technology industries, but deployment in air traffic control requires enhanced reliability, environmental qualification, deterministic performance and long-term component availability. The greatest technical value is therefore not created by individual hardware components alone, but by their configuration, synchronisation and validation as part of a safety-critical system.

The midstream layer contains digital tower platform developers, ATM software

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providers, tower-automation specialists, prime contractors and project integrators. These companies develop video-processing algorithms, controller interfaces, surveillance and flight-data integration, communication architecture, system monitoring and failover logic. They also undertake airport surveys, concept-of-operations development, safety assessments, installation, testing, training and regulatory support. The downstream layer comprises air navigation service providers, airport operators, defence organisations and government aviation authorities. Project margins are generally stronger in proprietary software, integration expertise, upgrades and lifecycle support than in standard hardware procurement. Installed platforms can subsequently generate recurring value through maintenance, cybersecurity updates, additional airport modules, AI functionality and control-centre expansion.

Segment Insights

By operating mode, single-airport remote towers and on-site digitally enhanced towers currently form the most established project base, while multi-airport remote tower centres represent the most strategically important expansion segment. Centralised centres offer the potential to distribute controllers and technical resources across several airports, but they require more complex operating procedures, workload management and redundancy. Contingency and backup towers are also becoming a more commercially viable segment because they offer a clear resilience benefit without requiring an airport to abandon its existing physical tower. Deployable systems remain smaller in commercial volume but have a distinct role in military, emergency and temporary-airfield operations.

By solution layer, visual surveillance hardware and system integration continue to account for a substantial part of initial project expenditure, while software, controller interfaces and lifecycle services are becoming more important as the installed base expands. Advanced video processing, target tracking, surveillance fusion and operational analytics are among the fastest-developing technical areas. However, the market is unlikely to become a standardised standalone software sector in the near term because software performance remains closely linked to sensors, networks, airport systems, operating procedures and regulatory validation.

Downstream Market Opportunities

Regional airports provide the clearest near-term opportunity because Digital Tower Solution can support infrastructure renewal, extended operating hours and access to

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shared air traffic control resources. Airports serving islands, remote communities or seasonal traffic may obtain additional value from centralised support and reduced dependence on maintaining a separate technical facility at each location. Large international airports represent a different but potentially higher-value opportunity through digital contingency towers, remote apron control, blind-spot coverage and integrated airside analytics. Defence customers require secure communications, rapid deployment and operational continuity, creating demand for specialised configurations with mobile infrastructure and enhanced redundancy. Across these customer groups, opportunities are strongest where the technology addresses a defined operational or resilience problem rather than functioning solely as a replacement for an existing tower building.

Regional Insights

Europe remains the largest and most mature regional market, supported by an established regulatory framework, a concentrated supplier ecosystem and operational projects in Northern, Western and Central Europe. The region hosts most of the leading integrated platform providers as well as a substantial base of specialised communication, display, optical-sensor and tower-automation suppliers. Continuing airport additions in Norway and new projects in Denmark, Poland, Lithuania, Belgium and the United Kingdom demonstrate that European demand is broadening beyond the first generation of remote regional-airport deployments. EASA’s updated guidance further supports a more consistent framework for project assessment, although national approvals remain necessary.

North America has strong capabilities in aviation electronics, AI-based visual processing and large-airport applications, but commercial adoption remains more selective. China is developing through domestic standards, research programmes and airport trials, with local suppliers building capabilities in optical systems, tower automation and surveillance integration. The Middle East is emerging as an important high-value application market for major-airport virtual towers and infrastructure modernisation, while Southeast Asia, Japan, South Korea and India remain predominantly project-led markets with limited indigenous end-to-end platform supply. Longer-term regional growth will depend on regulatory acceptance, local operating economics and whether early demonstrations progress into airport networks or national deployment programmes.

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Competitive Landscape Analysis

The Digital Tower Solution market has a concentrated core and a comparatively broad supporting supply chain. Approximately eleven validated group-level providers possess the platform depth, commercial references and system responsibility required for inclusion in the core supplier group, while the extended pool includes roughly fifty organisations involved in specialised software, tower automation, communications, displays, optical systems, recording, consulting and project integration. Leading integrated suppliers compete primarily through operational references, certification experience, ATM integration, controller-interface design and the ability to support projects over long service lives rather than through hardware pricing alone. European suppliers hold the strongest combined position because the region contains both mature platform companies and a dense network of safety-critical subsystem specialists. North American companies are differentiated by AI, aviation electronics and large-airport capabilities, while Chinese suppliers focus on domestic standards compliance, local integration and airport-specific delivery. Future competition is expected to involve more partnerships and selective acquisitions as platform companies add computer vision, cybersecurity and airport-operations capabilities. Nevertheless, the barriers created by safety validation and installed references mean that the central competitive group is likely to remain relatively concentrated.

Report Scope

This report studies the global Digital Tower Solution demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Digital Tower Solution, and provides market size (US$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Digital Tower Solution that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Digital Tower Solution total market, 2021-2032, (USD Million)

Global Digital Tower Solution total market by region & country, CAGR,

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2021-2032, (USD Million)

U.S. VS China: Digital Tower Solution total market, key domestic companies, and share, (USD Million)

Global Digital Tower Solution revenue by player, revenue and market share 2021-2026, (USD Million)

Global Digital Tower Solution total market by Type, CAGR, 2021-2032, (USD Million)

Global Digital Tower Solution total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Digital Tower Solution market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Saab AB, Frequentis AG, Kongsberg Gruppen ASA, NATS (Services) Limited, Indra Sistemas, S.A., RTX Corporation, Adacel Technologies Limited, The Second Research Institute, CAAC, Civil Aviation Air Traffic Control Technology Equipment Development Co., Ltd., Frequentis DFS Aerosense GmbH, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Digital Tower Solution market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Digital Tower Solution Market, By Region:

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United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Digital Tower Solution Market, Segmentation by Type:

On-site Digital Tower

Single Remote Tower

Multi-airport Remote Tower Centre

Simultaneous Multiple Remote Tower

Others

Global Digital Tower Solution Market, Segmentation by Solution Layer:

Visual Surveillance and Sensor Systems

Video Processing and Augmentation Software

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Controller Working Position and HMI

Others

Global Digital Tower Solution Market, Segmentation by Primary Visual System Architecture:

Fixed Panoramic Camera Array

PTZ-centric System

Hybrid Fixed and PTZ System

Others

Global Digital Tower Solution Market, Segmentation by Application:

Primary Aerodrome ATC

Aerodrome Flight Information Service

Contingency and Business Continuity

Others

Companies Profiled:

Saab AB

Frequentis AG

Kongsberg Gruppen ASA

NATS (Services) Limited

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Indra Sistemas, S.A.

RTX Corporation

Adacel Technologies Limited

The Second Research Institute, CAAC

Civil Aviation Air Traffic Control Technology Equipment Development Co., Ltd.

Frequentis DFS Aerosense GmbH

DFS Aviation Services GmbH

ATRAK a.s.

SkySoft-ATM SA

Tern Systems ehf.

ALES a.s.

Intelcan Technosystems Inc.

Saipher ATC

Copperchase Ltd

ELDIS Pardubice, s.r.o.

IDS AirNav

Insero Air Traffic Solutions

Rohde & Schwarz GmbH & Co. KG

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EIZO Corporation

Guntermann & Drunck GmbH

ScioTeq BV

HENSOLDT AG

Rheinmetall Air Defence AG

GESAB, S.A.

SITA

STR-SpeechTech Ltd.

Key Questions Answered

1. How big is the global Digital Tower Solution market?
2. What is the demand of the global Digital Tower Solution market?
3. What is the year over year growth of the global Digital Tower Solution market?
4. What is the total value of the global Digital Tower Solution market?
5. Who are the Major Players in the global Digital Tower Solution market?
6. What are the growth factors driving the market demand?

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