

# Eastern Europe C4ISR - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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## Abstracts

The Eastern Europe C4ISR Market size is estimated at USD 1.28 billion in 2024, and is expected to reach USD 1.53 billion by 2029, growing at a CAGR of 3.17% during the forecast period (2024-2029).

The C4ISR market in Eastern Europe is poised to grow significantly in the coming years. Major factors include growth in the need for advanced intelligence technologies and increasing defense expenditure from Russia, Ukraine, and Poland.

The growing tensions between various countries within the region are driving greater investments in combat and support capabilities. In this regard, several military programs are underway to effectively upgrade the C4ISR capabilities in Eastern Europe. The growth in the development of new technologies, new sensors, and novel weapons, incorporation of artificial intelligence, material and biosciences, and remote and automated systems will lead to the opening up of various business opportunities in the region, thereby leading to market growth in the near future. However, growing defense regulations in various Eastern European countries are expected to hamper the market's growth in the long run.

### Eastern Europe C4ISR Market Trends

The Intelligence, Surveillance, and Reconnaissance Segment will Showcase Remarkable Growth during the Forecast Period

The intelligence, surveillance, and reconnaissance segment is anticipated to show significant growth in the Eastern European C4ISR market. The changing nature of

warfare is expected to lead various countries within the region to focus on improving their C4ISR systems, thereby improving the capabilities of their defense forces, and this is expected to drive growth in the market in the near future.

Intelligence, surveillance, and reconnaissance are critical to a nation's strategic defense. Many Eastern European countries are now actively employing ISR throughout various sectors such as the sea, air, space, and cyberspace to collect, process, and disseminate data supporting current and future national security needs. Countries within the region have also now increased their focus toward the acquisition of manned and unmanned aircraft models for border surveillance, among other things. For instance, in November 2023, the Polish government announced that it planned to sign a production contract with General Atomics for MQ-9B SkyGuardian UAVs as part of an extensive air force modernization effort owing to the Russian invasion of Ukraine. The Polish defense forces will acquire the new aircraft to replace the current MQ-9A aircraft, which was leased to Poland to carry out reconnaissance missions on the country's eastern border.

There have also been significant developments in terms of satellites for space-based ISR missions since satellites provide advanced ISR information to defense forces. With the developments occurring in terms of sensor technologies, various defense companies in Eastern Europe are focusing on the development of advanced satellite systems to provide ISR support. For instance, in June 2021, Russia announced that it launched the Kosmos 2550 satellite, which has been designed to help the Russian military locate, identify, and potentially target foreign naval forces. The satellite is fitted with an active radar to capture all-weather, day-and-night imagery of ship movements. Thus, growth in the development of advanced ISR systems, coupled with the growing need to improve defense capabilities, is expected to lead to the segment witnessing significant growth during the forecast period.

### Russia to Dominate the Market during the Forecast Period

Russia holds the largest shares in the market, and the country is expected to continue its domination during the forecast period. Growing military defense spending and the increasing need to develop advanced ISR systems to increase capabilities of the army are some of the factors that drive the market's growth.

According to the Stockholm International Peace Research Institute (SIPRI) 2022 report, Russia's military spending amounted to USD 86.37 billion in 2022, an increase of 31%

compared to the military budget of USD 65.91 billion in 2021. On the other hand, the war between Russia and Ukraine led to Russia making use of various unmanned aerial vehicles of UAVs to carry out its intelligence, surveillance, and reconnaissance missions.

Russian defense forces increased their focus on the acquisition of new and advanced ISR systems. For instance, in November 2023, the Russian defense forces announced that they were developing a high-altitude reconnaissance aircraft system that would help provide real-time coordinates to ground-based weapons systems, thereby achieving more accurate strikes. The reconnaissance system will comprise a Myasischev M-55 Geophysica aircraft and a suspended container containing radars and optoelectronic stations. The reconnaissance system will also be capable of detecting radar radiation and radio communication centers from greater distances. Thus, growth in the military budget, coupled with growing developments in ISR systems, will lead to the market witnessing significant growth during the forecast period.

## Eastern Europe C4ISR Industry Overview

The Eastern European C4ISR market is semi-consolidated in nature, with a few players holding significant shares. Some prominent players in the market are Rostec, BAE Systems PLC, Thales, Saab AB, and Elbit Systems Ltd.

Various players in the market are now focusing on increasing their partnerships and acquiring new defense contracts to increase their customer base within Eastern Europe. Key OEMs are investing heavily in research to develop advanced C4ISR products with increased capabilities, thereby increasing product differentiation and gaining a competitive edge in the market. The growing integration of next-generation advanced technologies, such as artificial intelligence, will lead to growing business opportunities for various technology companies to enter the market and improve their products to meet the requirements of the defense sector within the region, thereby leading to the market witnessing significant growth in the near future.

Additional Benefits:

The market estimate (ME) sheet in Excel format

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