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Europe & CIS Network Centric Warfare (NCW) Market By Application (Intelligence, Surveillance, and Reconnaissance (ISR), Communications, Command and Control, Computer, Cyber), By Platform (Land, Air, Naval), By Country, Competition, Forecast & Opportunities, 2020-2030F

https://marketpublishers.com/r/E6C08DDA5E41EN.html
Date: September 2025
Pages: 135
Price: US$ 4,000.00 (Single User License)
ID: E6C08DDA5E41EN

Abstracts

Europe & CIS Network Centric Warfare (NCW) Market was valued at USD 45.49 Billion in 2024 and is expected to reach USD 66.04 Billion by 2030 with a CAGR of 6.41% during the forecast period. Network Centric Warfare (NCW) market is witnessing strong momentum driven by the increasing demand for advanced communication systems, the integration of artificial intelligence in defense platforms, and the growing emphasis on joint operations across air, land, sea, space, and cyber domains. Defense forces are adopting network-enabled capabilities to enhance situational awareness, ensure interoperability among diverse units, and facilitate faster decision-making. The shift toward modernized command-and-control structures is pushing investments in secure communication networks, data fusion technologies, and real-time intelligence systems that allow seamless coordination in complex combat environments.

Market Drivers

Modernization of Defense Infrastructure

Defense forces are undergoing extensive modernization to upgrade legacy systems with advanced digital capabilities. Traditional platforms, often limited by outdated communication methods, are being integrated with cutting-edge systems to enable interoperability and adaptability in fast-changing operational environments.

Modernization efforts focus on building resilient command-and-control systems, enhancing cyber defense frameworks, and adopting technologies such as cloud-based solutions and software-defined networks to ensure mission readiness. This transition helps create a more agile force capable of handling multi-domain operations that extend across land, maritime, air, and space environments. For instance, in 2024, EU states spent $370B on defence, up 19% from 2023 and projected at $412B in 2025. Investments reached $115B, with $95B for equipment, expected to top $108B in 2025. R&D rose to $14B and should hit $18B in 2025. The defence industry generated $172B turnover, $62B exports, and 627K jobs in 2023. EU programmes added $9.5B via the Defence Fund, $1.8B for mobility, $300M for joint procurement, $500M for ammunition, and a planned $1.6B under EDIP by 2027, with 2,500 SMEs central to supply chains.

Key Market Challenges

High Implementation and Maintenance Costs

Deploying a full-scale NCW framework requires significant financial investment, making cost one of the primary challenges for its adoption. The development and integration of advanced communication networks, real-time data fusion systems, and AI-driven decision-support platforms demand substantial funding. Beyond the initial deployment, continuous upgrades and maintenance further increase expenditure, as outdated systems quickly become ineffective in fast-evolving combat environments. High costs often extend to training personnel, as forces must be equipped with the technical expertise to operate, secure, and maintain advanced networks. Unlike traditional platforms that may function independently, NCW systems require constant connectivity and regular updates to remain functional, creating long-term operational expenses. Resource-constrained defense budgets can delay implementation or restrict the scope of network-centric modernization.

Key Market Trends

Adoption of Artificial Intelligence in Command Systems

Artificial intelligence is increasingly shaping the evolution of NCW by enhancing command-and-control decision-making. AI algorithms are being used to process massive streams of battlefield data, detect patterns, and provide predictive insights that enable proactive strategies. By integrating AI into command systems, defense forces can reduce decision-making time, enhance threat detection, and optimize resource deployment. Machine learning models can filter and prioritize data, ensuring

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commanders focus on critical information without being overwhelmed by irrelevant details. This improves accuracy in fast-paced combat environments, where delays can result in mission failure. AI is also enabling greater autonomy for unmanned systems, facilitating collaborative operations across manned and unmanned platforms. In logistics, AI supports predictive maintenance by identifying system failures before they occur, reducing downtime and ensuring operational readiness.

Key Market Players

- Cisco Systems Inc
- BAE Systems PLC
- General Dynamics Corporation
- Elbit Systems Ltd
- Lockheed Martin Corporation
- Northrop Grumman
- Raytheon Technologies Corporation
- Thales Group
- L3Harris Technologies Inc.
- Lumen Technologies

Report Scope:

In this report, Europe & CIS Network Centric Warfare (NCW) Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

- Europe & CIS Network Centric Warfare (NCW) Market, By Application:
  - Intelligence, Surveillance, and Reconnaissance (ISR)

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Communications

Command and Control

Computer

Cyber

Europe & CIS Network Centric Warfare (NCW) Market, By Platform:

Land

Air

Naval

Europe & CIS Network Centric Warfare (NCW) Market, By Country:

Germany

Russia

France

Spain

Italy

United Kingdom

Poland

Rest of Europe & CIS

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in Europe & CIS

Network Centric Warfare (NCW) Market.

Available Customizations:

Europe & CIS Network Centric Warfare (NCW) 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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