SOFTWARE, AI & DIGITAL SYSTEMS

Supplier Capability Brief

Software, AI and digital systems are now central to the performance, survivability and intelligence of modern defence platforms. They enable autonomy, decision-support, digital twins, secure communications, simulation, optimisation, embedded control, cyber-resilience and mission-system integration. As European defence programmes accelerate, Primes and OEMs require partners who can deliver trusted, secure, sovereign software and AI technologies that support next-generation capability and industrial modernisation.

Core subcategories

- AI, machine learning and data analytics
- Digital twin and simulation platforms
- Model-based Systems Engineering (MBSE) tools and software
- Cybersecurity, encryption and secure communication systems
- Sensor fusion, autonomy and real-time decision-support software
- Embedded software and mission-system integration
- Data architecture, cloud-edge systems and digital infrastructure
- Simulation, training and virtual environment technologies

Market outlook

Digitalisation, autonomy and AI-driven systems represent one of the fastest-growing areas in global defence investment. Defence forces are prioritising advanced computing, secure networks, synthetic training environments and autonomous decision-support to increase readiness, resilience and operational advantage.

Europe's accelerating defence-digitalisation programmes, sovereign cyber initiatives and AI-enabled capability development are driving significant demand for secure, trusted digital technology partners.

Key market indicators:

- **Global defence software and digital systems:** ~$48B in 2024 : ~$75B by 2030 (CAGR ~7–8%)
- **Military AI market:** ~$9B in 2024 : ~$21B by 2030 (CAGR ~14%)
- **Cybersecurity for defence:** ~$18B in 2024 : ~$30B by 2030 (CAGR ~8–9%)
- **Simulation & training systems:** ~$12B in 2024 : ~$18B by 2030 (CAGR ~7%)
- **Digital twin adoption in aerospace/defence:** double-digit annual growth

Typical defence applications

- Autonomy, navigation, sensor fusion and guidance software for UAVs and UGVs
- Cyber-secure mission systems, encryption modules and network protection
- Digital twins for aircraft, vehicles, propulsion and complex subsystems
- AI-enabled threat detection, decision-support and system optimisation
- Embedded software for avionics, munitions and onboard computing
- Synthetic training environments, simulation platforms and virtual ranges
- Cloud-edge architectures for battlefield connectivity and data processing

Who should exhibit

- Software developers supporting defence and aerospace programmes
- AI, machine-learning and data-analytics companies
- Digital-twin and simulation technology providers
- Cybersecurity and secure-communication specialists
- Embedded-systems and mission-system integrators
- Sensor-fusion and autonomy software developers
- Cloud, edge-computing and digital-infrastructure suppliers
- Training, simulation and virtual-environment technology companies

What primes & OEMs are looking for

- Trusted, sovereign European software and AI suppliers
- Secure, resilient and certifiable codebases for mission-critical platforms
- Digital-twin, MBSE and simulation technologies to accelerate development
- Autonomy, sensor-fusion and AI-driven performance tools
- Cybersecurity partners with defence-grade compliance
- Advanced data architecture, cloud-edge solutions and digital infrastructure
- Software partners able to scale across multiple platform types

Showcase your SOFTWARE, AI and DIGITAL-SYSTEMS CAPABILITIES to defence engineering, procurement and programme teams who are ACTIVELY IDENTIFYING and ONBOARDING new suppliers across Europe.

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