

Emerging technology behind the scenes of defence

Defence and aerospace leaders prioritise integration and interoperability to ensure mission-readiness across critical assets



Digital
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Foreword

Reliability. Availability. Warfighting readiness. These three requirements are underpinning many of the current concerns across defence and aerospace. There is increasing pressure for organisations across the defence ecosystem, globally, to meet the challenges of an ever-changing world... an ever-evolving threat landscape. That pressure includes being able to keep critical physical assets operating at peak performance as long and as often as possible.

In fact, as many as 62% of organisations that took part in our survey¹ across army, navy, air force and defence equipment and supply subsectors confirm that the pressure they're facing to ensure mission-readiness among their complex assets is "significant".

A resounding 97% of the 540 respondents acknowledge that there is at least some pressure² to ensure this level of durability and agility across their complex asset management strategies. It is no surprise, therefore, that 81% of organisations in global defence and aerospace organisations are prioritising transforming their approach to complex asset management this year³.

In this report, we will delve further into these pressures and transformation plans, uncovering the challenges that organisations in these spaces face: including current readiness levels and what the priority list looks like when it comes to managing assets more effectively.

From there, we will explore the digital solutions that decision-makers in defence and aerospace are already utilising to better manage critical physical assets, and what they're looking for from these technology investments.

And, finally, we assess the ease of integrating new technologies and look at BAE Systems' role in facilitating a smoother transition to more effective complex asset management.



Andrea Thompson
Group Managing Director

The story in numbers

We surveyed 540 senior decision makers in defence and aerospace from the UK, Canada, Australia, Sweden, Denmark, Norway, Japan, France and The Kingdom of Saudi Arabia. Each respondent was asked to reveal their perceived levels of mission-readiness when it comes to **complex asset management**, and their plans for further digital adoption in the future.

A pressing concern...

...with integration and interoperability hitting worldwide wish lists

Uncovering the challenges faced by not effectively managing complex physical assets via digital solutions this past year; and each country's wish list moving forward:



Canada top challenges

1. Decreased customer and stakeholder satisfaction
2. Failing to meet regulations, quality standards and/or standard operating procedures
3. Cost repercussions
4. Delayed asset deployment
5. Downtime in equipment

Canada wish list

1. Better interoperability with existing infrastructure
2. Increased investment in staff training and expertise
3. Enhanced predictive maintenance capabilities



United Kingdom top challenges

1. Decreased customer and stakeholder satisfaction
2. Health and safety issues
3. An inability to keep up with threats

United Kingdom wish list

1. Improved data integration across multiple systems
2. Stronger regulatory compliance and risk management tools
3. Stronger cybersecurity and data protection measures



France top challenges

1. Downtime in equipment
2. Failing to meet regulations, quality standards and/or standard operating procedures
3. Delayed asset deployment
4. Decreased trust

France wish list

1. Enhanced predictive maintenance capabilities
2. Increased investment in staff training and expertise
3. Stronger cybersecurity and data protection measures
4. More automation to reduce manual workload



Denmark top challenges

1. Failing to meet regulations, quality standards and/or standard operating procedures
2. Cost repercussions
3. Downtime in equipment
4. Security vulnerabilities

Denmark wish list

1. More user-friendly interfaces and dashboards
2. Better interoperability with existing infrastructure
3. Increased investment in staff training and expertise
4. Stronger cybersecurity and data protection measures
5. Enhanced predictive maintenance capabilities



Norway top challenges

1. Failing to meet regulations, quality standards and/or standard operating procedures
2. Security vulnerabilities
3. An inability to keep up with threats

Norway wish list

1. Stronger cybersecurity and data protection measures
2. Enhanced predictive maintenance capabilities
3. Better interoperability with existing infrastructure
4. Better real-time tracking and monitoring of assets



Sweden top challenges

1. Failing to meet regulations, quality standards and/or standard operating procedures
2. Decreased customer and stakeholder satisfaction
3. An inability to keep up with threats
4. Security vulnerabilities

Sweden wish list

1. More user-friendly interfaces and dashboards
2. Stronger cybersecurity and data protection measures
3. Stronger regulatory compliance and risk management tools



The Kingdom of Saudi Arabia top challenges

1. Failing to meet regulations, quality standards and/or standard operating procedures
2. Decreased customer and stakeholder satisfaction
3. Cost repercussions
4. An inability to keep up with threats

The Kingdom of Saudi Arabia wish list

1. AI-driven analytics for smarter decision-making
2. Stronger regulatory compliance and risk management tools
3. Stronger cybersecurity and data protection measures



Japan top challenges

1. Cost repercussions
2. Failing to meet regulations, quality standards and/or standard operating procedures
3. Decreased customer and stakeholder satisfaction

Japan wish list

1. Better interoperability with existing infrastructure
2. More user-friendly interfaces and dashboards
3. Increased investment in staff training and expertise
4. Stronger regulatory compliance and risk management tools



Australia top challenges

1. Security vulnerabilities
2. Cost repercussions
3. An inability to keep up with threats

Australia wish list

1. Better interoperability with existing infrastructure
2. Stronger regulatory compliance and risk management tools
3. Improved data integration across multiple systems



Enabling warfighting readiness

80%

agree complex asset readiness is crucial to responding to mounting geopolitical tensions³

81%

feel that ensuring mission-readiness is stressful for their teams³

Identifying and investing in digital solutions

8-in-10

agree that transforming their organisation's approach to complex physical asset management is a key priority for 2025 (81%), with 66% planning to invest more in 2025 than 2024⁴

82%

say that leveraging AI is at the forefront of their digital strategy³

Data integration and interoperability with existing systems will be key to success

82%

agree access to the right data is critical to ensuring complex assets are mission-ready³

Simple integration with existing systems

highlighted as the **most important feature** when it comes to looking for a digital solution to manage complex assets



Introduction

What do we mean by complex assets in the context of defence and aerospace? Simply, it covers the critical, physical platforms that are tasked across land, sea and air to safeguard our societies and citizens. This includes the ships, jets and tanks that need to be operating at peak performance to ensure mission-readiness through the lens of national security.

Effective management of these assets is made complex by multiple factors, for example, many defence platforms are built in modular elements, but have nationwide supply chains connecting many suppliers for each module. Inevitably, in this context, much complex asset management must deal with fractured data sets and 83% agree there is simply too much complexity involved in non-digital complex asset management.³

This doesn't necessarily mean that defence would define itself as 'digitalised', though.



Data couldn't be more important for the effective management of defence platforms across their life cycle. Integration and interoperability must form a crucial foundational layer for defence organisations that aspire, in the near future, to apply emerging technologies such as artificial intelligence (AI).

Without this foundational data layer, Artificial Intelligence will simply highlight the problematic gap in fragmented datasets.

Luigi Sidoli
Head of Digital Management

Digital
Intelligence

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Success from a digital management perspective is determined by levels of interconnectivity and interoperability, security, compliance and much more. Digital management of assets must ensure cost effectiveness, efficiency, innovation, health and safety, sustainability and competitiveness to indicate optimisation.



Military processes have been developed over time with extremely rigid hierarchies. They are built for efficiency and strict adherence to process.

While we have ‘digitised’ these processes into zeroes and ones, we haven’t actually ‘digitalised’ them - but that shift is happening and modern systems are breaking that paradigm. This is a step-change for defence – one for which we are starting to see a new appetite.

Chris Morton
Global Industry Director
Aerospace and Defense



Then there are external pressures to grapple with. For example, as many as 41% of organisations cite increased cyber threats and supply chain vulnerabilities as challenges that could derail effective management. No respondents at all believe there are no external factors at play. Everyone is experiencing at least one factor working against the ambition of complete readiness and optimised digital management.

All of this points towards the strains of a connected battlespace where the boundary between traditional military domains in defence and aerospace are now blurred with the realm of digital. It's a trajectory echoed by the UK government already, as they [plot investments of more than £1 billion into a pioneering 'Digital Targeting Web' to spearhead battlefield engagements, as well as a new Cyber and Electromagnetic Command](#) to oversee cyber operations for defence. The country's [Strategic Defence Review 2025 further affirms the need for heightened investment in digital solutions in this "new era of threat, which demands a new era for defence"](#).

In this new era, making sense of data, ensuring seamless flows of insights and intelligence to where they are most needed and connecting disparate sources of information across a truly global network are just three of the boxes that can be ticked with effective digital management. However, these are proving difficult to attain so far.

Over the next three chapters, we will explore the challenges and pressures being faced against a backdrop of a rapidly evolving threat landscape, where 80% of senior defence decision makers agree that complex asset readiness is crucial to responding to mounting geopolitical tensions. We will assess the technologies and investments that organisations are targeting to limit downtime, accelerate deployment, speed up repairs, save money, remain compliant and to enhance information sharing through reliable, seamless data flow. Finally, we will look to the future of complex asset management, and what defence and aerospace envisage the end goal to be.



Chapter I

Complex asset management challenges

A pressure for real-time readiness

With data generated from numerous assets situated across different time zones and geographies, the challenge of effectively assimilating and acting on that information is significant. Issues of data fragmentation and working across silos potentially contribute to a lack of interoperability between systems to create an immediate disconnect that will delay or work against optimal decision making. Disconnection also creates gaps for exploitation, while making it difficult to adhere to evolving regulations and mandates. Perhaps it's no surprise, then, that 81% of defence organisations agree that preparing their physical assets to be mission-ready is stressful on their teams.³

The reasons why mission-readiness is so vital are well known and show no signs of abating. The UK's 2025 Strategic Defence review cites "growing Russian aggression, new nuclear risks, and daily cyber-attacks at home". On the other side of the world, [Australia also updated its National Defence Strategy](#) in the past year, dovetailing it with a 2024 Integrated Investment Program to deter the effects of everything from geopolitical tensions in the US and China to climate change.



With military platforms being so complex today, digital ways of working are crucial to ensuring mission readiness.

But this can be really challenging. Take a warship, for example, the enterprise that supports and maintains that asset requires quick and seamless access to quality integrated data to deliver across all the support functions. We are seeing more organisations increase their adoption of emerging technologies such as AI-powered solutions to solve these complex data challenges and ultimately to manage and deploy their assets more effectively."

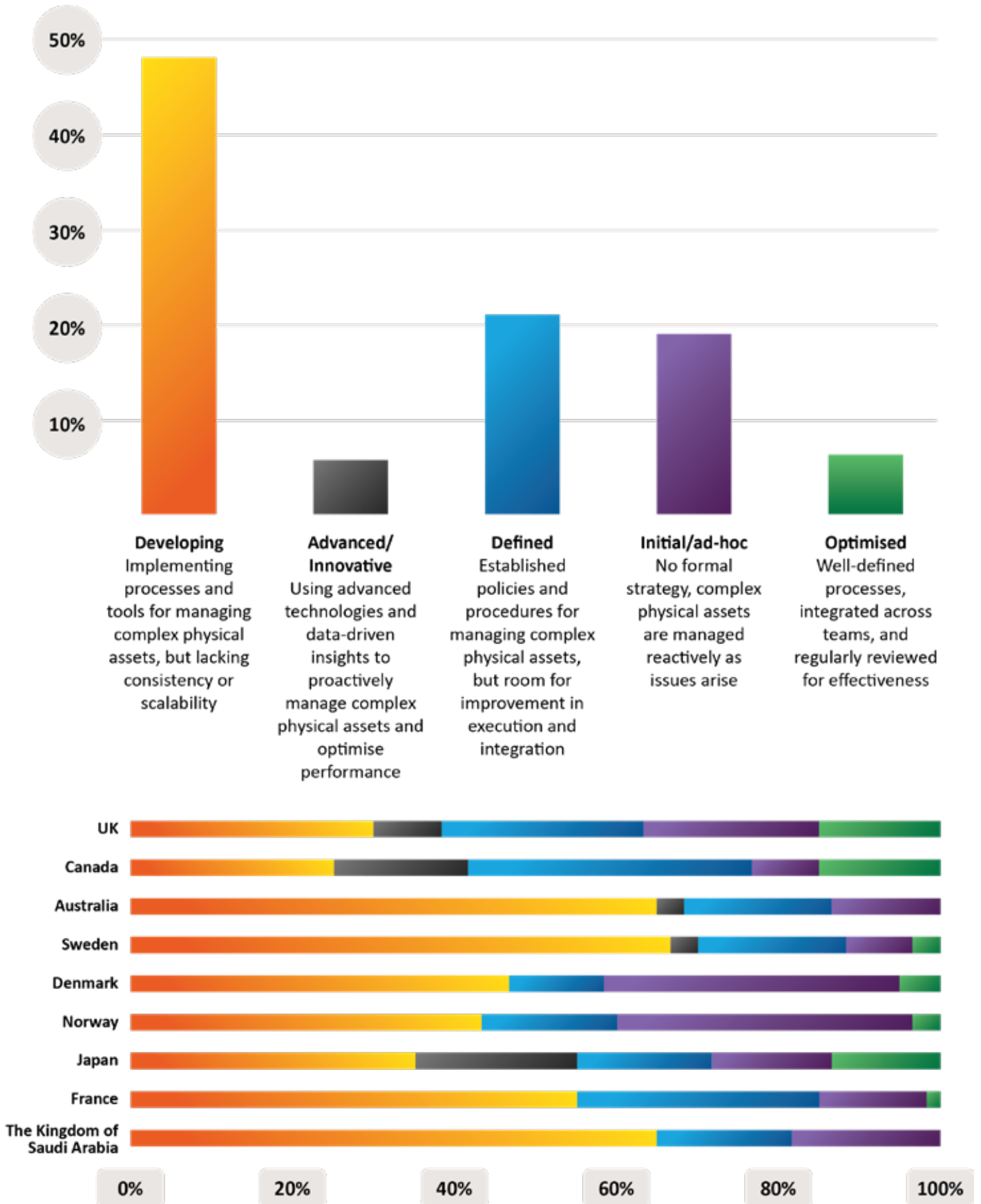
Darren Nice
Head of Mission Applications

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In this context, we asked respondents, globally, what stage they felt they were at when it came to complex asset management via digital solutions.



Almost half (48%) are currently developing and implementing processes and tools that would help offset some of the above challenges, but admit they're currently lacking consistency and scalability in their infrastructure. Tellingly, only 6% would describe their asset management stage as either advanced or optimised (6% each) – a figure that rises in the UK (optimised – 15%), Canada (advanced – 17%) and Japan (advanced – 20%); but that drops even further in Australia and Saudi Arabia especially, where 0% believe they are at an optimised stage. Similarly, Denmark, Norway and France all had zero respondents believing they're at an advanced stage.

Commenting on the results, Nice says, "Scoping a sustainable complex asset management solution is a real challenge for defence organisations, who are dealing with many individual systems which have been put in place over time. A move to a single view solution is a big change which can be perceived as high risk and expensive, which is perhaps why we are seeing a lack of consistency at the moment."

Sidoli adds, "Defence organisations have traditionally not been early adopters of complex asset management solutions, preferring to invest in the assets themselves rather than what goes on behind the scenes.

"That said, in our industry conversations we see that organisations in Japan are advancing rapidly in their use of smart factories and AI, particularly in the air domain. Meanwhile in Europe, many consider the UK Ministry of Defence to be leading the way in technology deployment. These sentiments are reflected in the research with respondents in these regions (and also in Canada) showing higher levels of early optimisation in the complex asset management space."

For those that have already begun their digitisation journeys to some extent, almost 100% say they have seen return on their investment into digital solutions.⁵



Drivers towards action

The research points to a range of different concerns across the current landscape, which may increase the desire to invest in technology in this space.

The top three experienced challenges as a result of not effectively managing complex physical assets via digital solutions in the past year are:





In **Australia** there is a clear desire to increase the effective management of complex physical assets. The Australian National Audit Office (ANAO) has emphasised the importance of managing the sustainment of assets – calling out the Navy’s two largest Landing Helicopter Dock (LHD) vessels, which have operated with ‘ongoing deficiencies’ and experienced ‘critical failures during operations’ according to a recent ANAO report.

In this market, the research respondents also pointed to security vulnerabilities as being a key concern where digital solutions are not used effectively to support complex asset management.

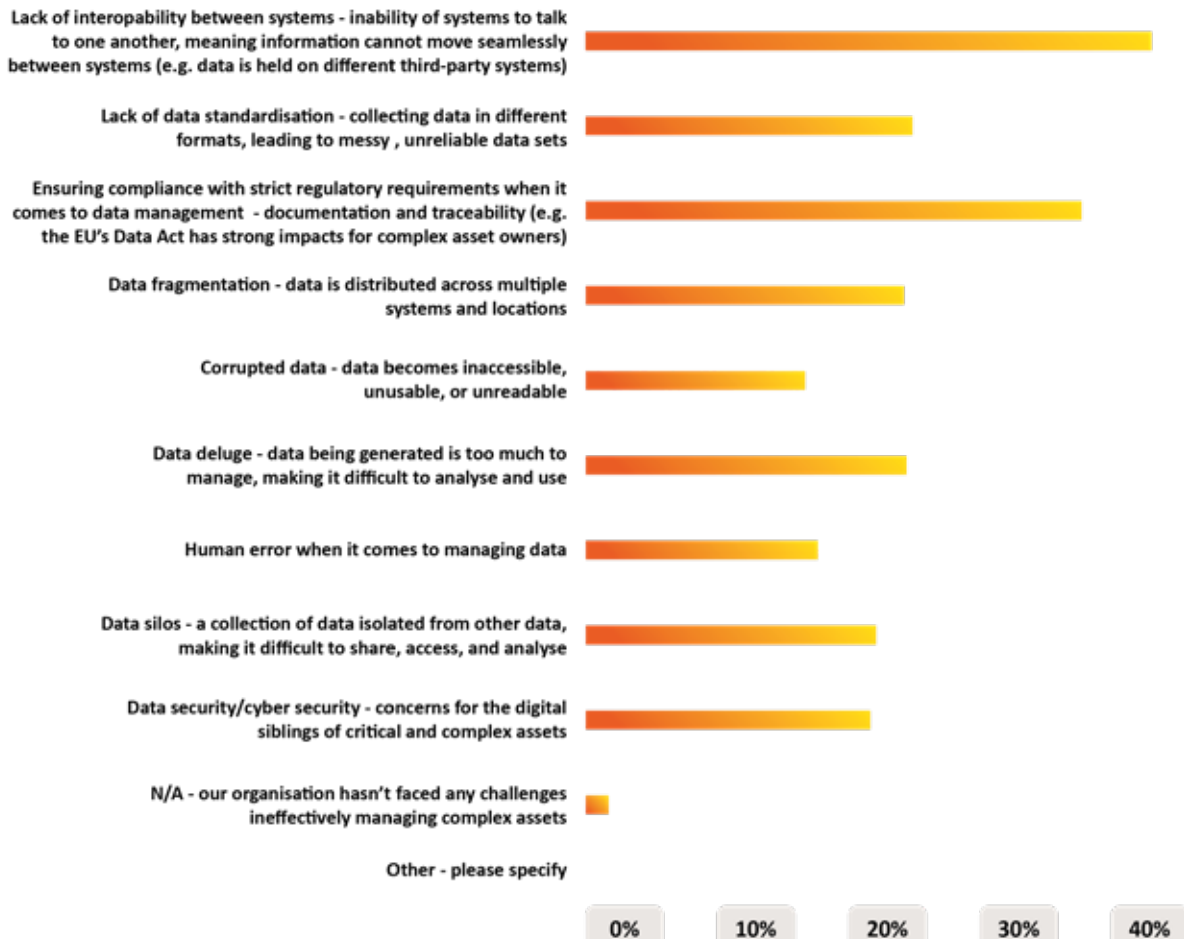


In **The Kingdom of Saudi Arabia**, failing to meet regulations, quality standards and/or standard operating procedures (32%) was cited as a top challenge faced by organisations if they were not effectively managing their complex assets.

Data considerations

However, any digital solution deployed to support with asset management in defence must be prepared to deal with a highly complex environment.

Delving into listed data challenges more specifically, we see the following top concerns which must influence any investment choices made in this space:





Defence and aerospace organisations grapple with issues of interoperability, data fragmentation, regulation compliance and cybersecurity, meaning that there could be perceived problems around the integration, connectivity and scalability of innovative technology solutions in the complex asset management space.

Nice comments, “The research shows us that defence organisations face specific data challenges. It’s not just about bringing data together, but in terms of data aggregation, if you are to have a single source of truth around assets, that solution must be trusted, explainable, safe and secure. Furthermore, defence platforms are expected to have long lifecycles, so any technology needs to remain future-proofed and sustainable.”

Chapter 2

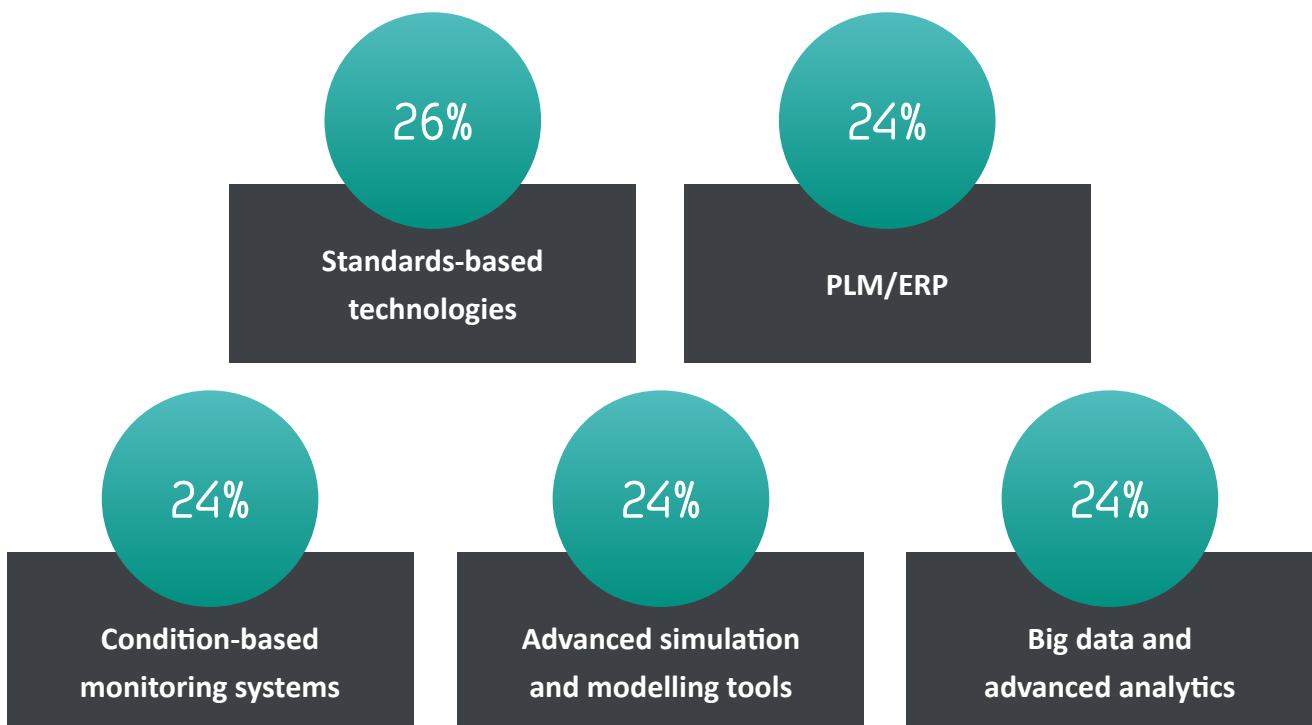
Identifying digital solutions

Current capabilities and deployments

In this chapter, we explore the digital solutions that organisations in defence and aerospace are already looking to, to better manage their physical assets, and also the capabilities they are still trying to unlock. The aim for many is to create digital threads between different data sets pertaining to each asset, unlocking 360-degree visibility of assets' condition, preparedness, performance and connectivity to the broader asset network.

Respondents were asked what solutions they have already implemented as part of their complex asset management strategy.

All 540 respondents have adopted some form of digital solution to help manage their complex physical assets so far. In addition, 66% of organisations are planning behind the scenes to invest more into digital solutions for complex asset management in 2025 than 2024.⁴



Standards-based technologies (26%) have laid the foundations so far, paving the way for big data and advanced analytics, advanced simulations and modelling, condition-based monitoring systems, digital twin technologies, product lifecycle management and ERP systems, and greater automation and robotics, to name a few.

Desired capabilities, benefits and functions

More broadly, there are two key areas of digitisation that companies have earmarked to focus their strategies around:



82%

agree that access to the right data is critical to ensure complex assets are mission-ready.³



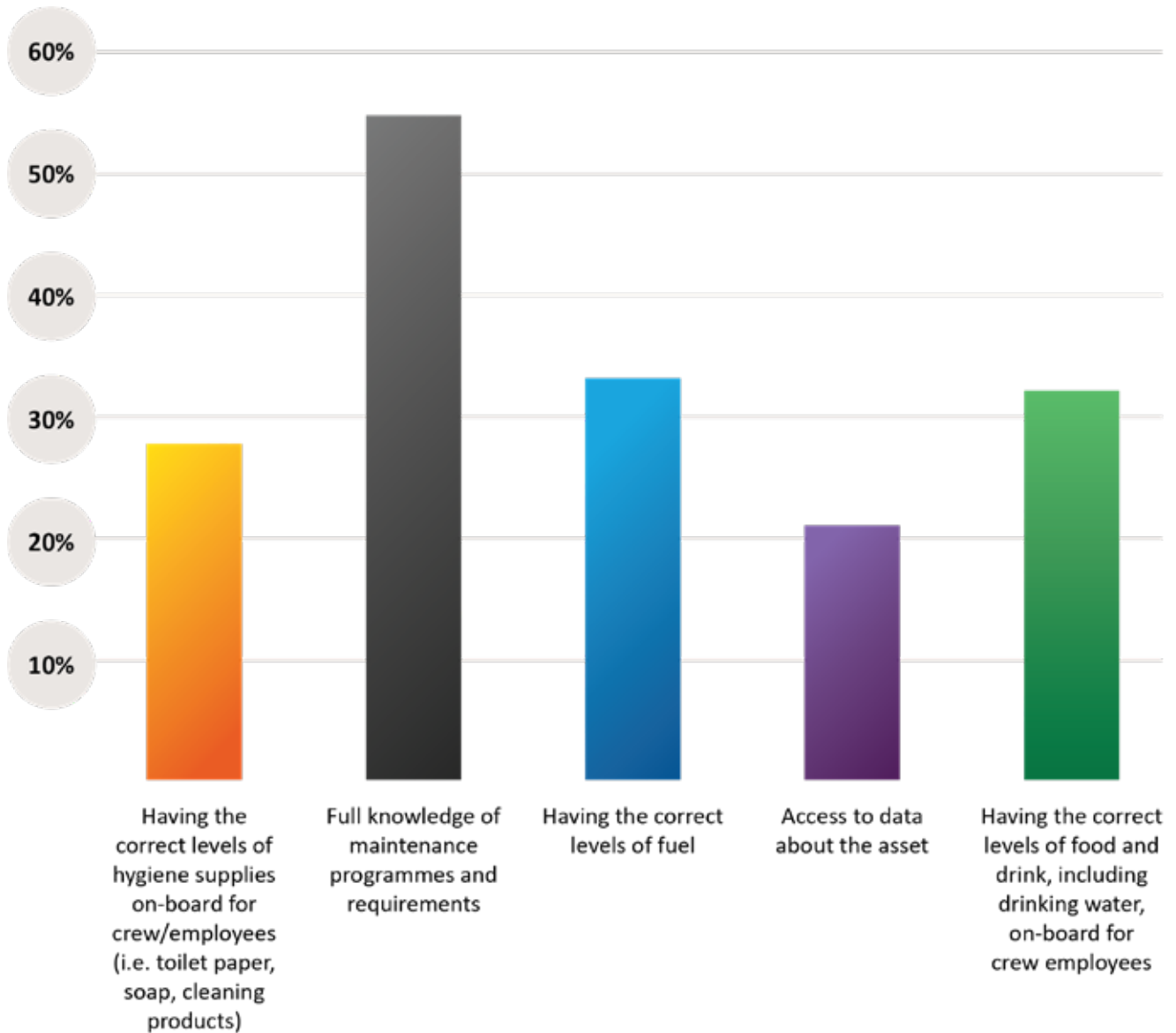
82%

confirm that leveraging AI is at the forefront of their digital strategy.³



“If you know that your platforms are safe to operate, and where their vulnerabilities are, you can make informed decisions to increase their availability,” comments Sidoli. “Once the data house is in order, it becomes possible to turn to new and emerging technologies to make inferences from data and accelerate deployments. It’s all about increasing the availability of platforms and therefore the ROI of platforms too.”

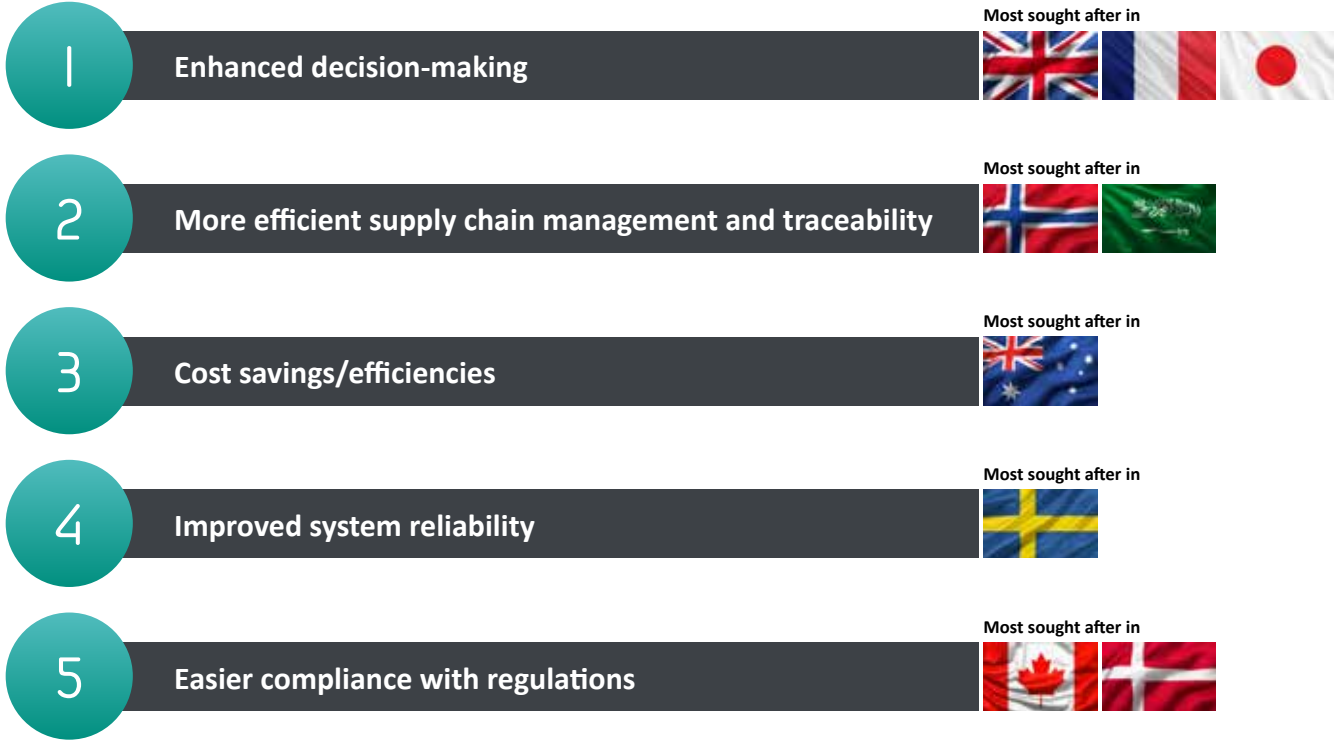
To this end, respondents were asked to pinpoint the main capabilities they'd expect from digital solutions to ensure mission-readiness of complex assets.



Maintenance optimisation (55%) was the standout feature listed, delving into the true essence of 'management' – durability, longevity and continuous peak performance.

“Having a full knowledge of maintenance programmes for complex physical assets cannot be underestimated because maintenance drives operations,” says Chris Morton, Global Industry Director, Aerospace and Defense, IFS. “If I am an operational commander, I can work out how to get fuel and provisions, but a helicopter that doesn’t fly does nothing to support my mission. Where maintenance can be driven with effective digital solutions we will start to see more efficiencies and less downtime.”

Respondents from each country were then asked what the main benefits of investing in complex physical asset management via digital solutions are or would be:








A lack of interoperability is not only a system related challenge, but also a trust and access issue. To achieve the right balance, data needs to be assured, controlled and available at the point of need. In a military context, information is decision advantage, so users need to have high-quality information about their equipment in order to plan/ assure their missions. This means that for defence organisations, collecting information from, and connecting with, the supply chain, is probably the most important aspect of creating and maintaining the digital thread of a complex asset.





Simon Pettersson
Director Industry Vertical Defence



Respondents from each country were also asked, simply, what would help their organisation's complex asset management:

 <p>Better interoperability with existing infrastructure</p>	 <p>Improved data integration across multiple systems management</p>	 <p>Enhanced predictive maintenance capabilities</p>	 <p>More user-friendly interfaces and dashboards</p>	 <p>Stronger cyber security and data protection measures Enhanced predictive maintenance capabilities</p>
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<p>More user-friendly interfaces and dashboards</p> 	<p>AI-driven analytics for smarter decision-making</p> 	<p>Better interoperability with existing infrastructure</p> 	<p>Better interoperability with existing infrastructure Stronger regulatory compliance and risk management tools</p> 
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Globally, stronger cyber security and data protection (26%), stronger regulatory compliance and risk management (26%) and better interoperability (24%) came to the fore once more, this time also joined by improved user friendliness of digital solutions.

Chapter 3

The future of asset management

Making the complex, simple

Based on the feedback from chapters 1 and 2, we can see there is a huge appetite to invest in digital solutions for improved complex asset management. Respondents across land, sea and air are aware of the challenges around failing to digitise, but also the challenges of implementing new technologies if not guided effectively.

When asked what they believe will shape the future of complex physical asset management via digital solutions, they cited possibilities of:



High-profile cyber-attacks



Supply chain vulnerabilities



Regulatory compliance and government mandates



Increasing reliance on interconnected systems

This future is dictating organisations' ambitions to enhance levels of interoperability, compliance, security, health and safety, communication and supply chain management through more autonomous and AI-driven solutions.



As defence organisations strive to find new ways to respond to threats faster, with greater precision, in a data-fuelled battlespace, we anticipate that AI will play an increasingly important role in decision-making processes.

AI is most useful when it is deployed alongside a robust and integrated set of data and within a decision-making chain that continues to prioritise human expertise. We are seeing the rise of intelligent autonomous systems, for example, that can collaborate to interpret data. These can help to improve mission planning and coordinate action because they allow decision-makers to get to the crucial information faster.

Dr Edward Jackson
Director and Co-Founder

OXFORD DYNAMICS

Ultimately, 83% agree that while the process of integration and implementation of a range of different solutions in this defence landscape might not be easy, there is just too much complexity involved in dealing with this future through non-digital asset management.³



Because of the changing nature of warfighting, defence leaders need to be able to act quickly, be flexible, and remain responsive. Data plays a crucial role, because it can help decision makers better understand what assets they have available and how these can be best deployed to counter a threat. However, if data isn't used effectively it can become a burden. We are working to ensure that data is an asset and not a burden to end users - so that they can get the clear insights they need to make timely and effective decisions.



Complex military platforms are huge investments for defence organisations such as the UK's MOD, so getting more value from these assets is critical. Supporting the management of data surrounding these assets will help to reduce downtime and ensure that missions are managed effectively. Embracing an open architecture approach will not only support system upgradability and interoperability with other assets and nations, but also enable systems to evolve - meaning they can be updated as technology advances and as threats evolve.

Therefore, having a solid approach to the management of digital assets is increasingly crucial for operational effectiveness - especially given the pace at which our adversaries will be considering how to overcome similar challenges.

Lauren Casson
Business Enablement Manager, Defence

Digital
Intelligence

BAE SYSTEMS



From this rallying cry, respondents were asked what was most important to them when looking for a digital solution to manage complex physical assets:

Attributes listed in order of priority

1

Simple integration with existing systems/applications

2

Advanced analytics and reporting capabilities

3

Compliance with regulatory requirements

4

Integration with IoT and real-time monitoring

5

Global support and deployment capabilities

6

Enhanced collaboration tools

7

Customisability

8

Vendor support and reliability

9

Open architectures/standards

10

Futureproofing and adaptability



The UK, Canada, Australia, Sweden, Denmark and Japan all listed simpler integration capabilities as their priority as they plot their digital transformations moving forward. Norway listed enhanced collaboration tools as the most important factor, while France pinpointed the need for advanced analytics and reporting capabilities, and Saudi Arabia selected both this and simple integration capabilities.

Globally, the recurring theme of integration and interoperability with existing systems is of paramount importance for most.

Smarter analytics and reporting capabilities also scored highly to better assess the performance of assets across the portfolio in real-time. Smarter monitoring confirmed this need through the lens of IoT integration, also highlighting the need for improved, automatic communication between systems. Widespread deployment, compliance, customisability, reliability, futureproofing, sustainability and collaboration all add to the list of functions and characteristics that vendors should be weaving into their marketing strategies as investments continue to rise.



Introducing PropheSEA®

A legacy of excellence

The research indicates key defence priorities for digital solutions as part of their physical asset management functions, and indeed the types of technologies they're already looking at to achieve more seamless integration, greater interoperability, continuous compliance, and more accessible and secure data.

BAE Systems is delivering this through PropheSEA®, a systems and data integration software that delivers integrated product support across an asset's entire lifecycle.



Our PropheSEA® solution addresses the key areas of concern highlighted by this industry research. This is why it is already being used by several key defence organisations across the world."

Darren Nice
Head of Mission Applications
BAE Systems Digital Intelligence



We have developed PropheSEA® to help our customers keep their crucial assets optimised throughout their lifecycle, delivering performance and management data in real-time, and providing them with an agnostic digital backbone to deliver the insights needed to unlock strategic advantage in the most demanding environments.

Luigi Sidoli
Head of Digital Management
BAE Systems Digital Intelligence



Drawing from a suite of commercial off-the-shelf applications, PropheSEA® is a scalable solution that allows customers to invest at their own pace. It's easily configurable and can seamlessly integrate with existing and third-party technologies. It not only provides new capability but maximises previous investments.

Benefits include:

- **360-degree visibility** of all assets to enable faster, more informed decisions.
- **Improved availability of assets** based on predictive analytics which encourage more pre-emptive actions.
- **Enhanced ROI** driven by improved asset availability and performance across its full lifecycle.
- **Expert support** from a company that has delivered game changing integrated product support to some of the most secure environments for more than 20 years.

Made up of a robust data management platform, the user gateway, and capabilities that span lifecycle management, secure collaboration, analytics and business intelligence, PropheSEA® is already being used by a number of high-profile customers. These include the Royal Navy, as well as NATO countries as they look to centralise data in key defence domains.

Conclusion

Making complex assets mission-ready

A race that is only just getting started



A resounding majority (80%) of decision makers across defence and aerospace agree that complex asset readiness is crucial to navigating mounting geopolitical tensions in the modern climate. A similar figure of 83% agree that to manage assets effectively through non-digital means is too complex.³

The answer, therefore, is to introduce more advanced digital solutions to elevate levels of asset management and readiness moving forward, but only 12% of respondents can say they're at an advanced or optimised stage with this already.

In fact, only 8% are fully utilising complex asset management via digital solutions currently. The question is, how will that situation change moving forward, and how quickly?

At first glance, there is promising intention. With an acknowledgement that data interoperability and data integration are challenges to be addressed, two-thirds will invest more this year in improving their complex asset management than last.⁴

As we look to the future, issues of interoperability and integration, compliance, supply chain management, and cyber security will continue to drive vigilance and proactivity around the issue. The key now is to collaborate with companies who can guide them through those critical adoptions, as we move towards an era of holistic support solutions, supporting a mission-ready future from behind the scenes of defence.

Methodology



We surveyed 540 senior IT decision makers, business decision makers and engineers in defence and aerospace from the UK, Canada, Australia, Sweden, Denmark, Norway, Japan, France and The Kingdom of Saudi Arabia.

Each respondent was asked to reveal their perceived levels of mission-readiness when it comes to **complex asset management**, and their plans for further digital adoption in the future.

The data was collected by Censuswide between 24.04.2025 - 14.05.2025. Censuswide abides by and employs members of the Market Research Society and follows the MRS code of conduct and ESOMAR principles. Censuswide is also a member of the British Polling Council.

References

- ¹ From results of a survey carried out between 24.04.2025 - 14.05.2025. Respondents demographic profile determined by natural fall out as there is no reliable data available to represent the national population. All data based on this survey unless otherwise stated.
- ² 'Significant pressure' and 'Some pressure' responses combined.
- ³ 'Strongly agree' and 'Slightly agree' responses combined.
- ⁴ 'Yes – significantly more' and 'Yes – more' responses combined.
- ⁵ All 'yes' responses combined.
- ⁶ Reverse of 'N/A my organisation hasn't implemented any technologies as part of our digital solution to manage complex assets'.

With thanks to our contributors



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We are Digital Intelligence

BAE Systems Digital Intelligence is home to 4,800 digital, cyber and intelligence experts. We work collaboratively across 16 countries to collect, connect and understand complex data, so that governments, nation states, armed forces and commercial businesses can unlock digital advantage in the most demanding environments. Launched in 2022, Digital Intelligence is part of BAE Systems, and has a rich heritage in helping to defend nations and businesses around the world from advanced threats.

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