

# The Military Communications & COTS Market 2012-2022

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## Abstracts

Communications remain the backbone of militaries across the globe. In an increasingly digitised battlespace, the communications requirements of troops are constantly expanding, with demand rising for increased capability all the way down the command chain. As a result, spending on military communications is set to increase significantly over the forecast period, mainly fuelled by the spending drives of emergent powers such as China and India. Furthermore, the vital importance of military communications will ensure that most spending will be spared from defence budget cuts in recession-hit Europe and North America. Visiongain has determined that the military communications market will be worth \$17.03bn in 2012.

Continued growth in military communications spending is also being driven by technological, as well as economic, development. The rise to prominence of unmanned platforms and software-defined tactical radios, capable of beyond-line-of-sight (BLOS) and on-the-move (OTM) communication, places significant new demands on bandwidth. Many militaries are aiming to build their own satellite communications and navigational infrastructure so as to reduce reliance on the US. Meanwhile, the US itself, which accounts for a substantial proportion of the global military communications market in 2012, is seeking to upgrade and modernise its military communications infrastructure and equipment.

The use of commercial-of-the-shelf (COTS) equipment has become an increasingly prominent feature of the military communications market. Research & development is being conducted more frequently by private companies as opposed to defence ministries. Companies are increasingly dictating what products will be manufactured and seeking to exploit crossover potential between the commercial and military communications sectors.

The USA, China and Western Europe will continue to be at the forefront of spending in this sector, albeit with modest growth during the forecast period besides China, allowing for the likes of India, Russia and Saudi Arabia to increase the size of the market shares they command. The Middle East and Asia-Pacific will be two of the key regions for growth.

## **Unique Selling Points**

Comprehensive analysis of the prospects for the military communications & COTS market from 2012-2022.

Analysis and forecasting informed by extensive expert consultation with industry leaders. You will be able to read full transcripts of interviews from 2 leading companies involved within the military communications market.

151 tables, charts and graphs that quantify, analyse and forecast the changing dynamics of the military communications market between 2012-2022.

Forecasts and analysis for the global military communications market between 2012-2022

Forecasts and analysis for 5 submarkets of the military communications market from 2012-2022.

Forecasts and analysis for 14 national military communications markets, as well as rest of the world figures and projections for the period 2012-2022

Analysis of the forces that influence and characterise the military communications market

Profiles of 40 leading companies operating within the military communications market.

## **Methodology**

This report has been compiled by combining information obtained from a very wide and rich mixture of primary and secondary research sources, producing a broad industry

overview. Visiongain sought opinions from leading figures in the military communications market to underpin the analysis of market drivers and restraints. The study draws on a diverse range of official corporate and governmental announcements, media reports, policy documents, industry statements and expert opinion as a basis for discussing and predicting developments in the military communications market between 2012 and 2022. Visiongain considers that this methodology results in an accurate, objective mixture of analyses and forecasts.?

## **Why you should buy The Military Communications Market 2012-2022**

You will receive a comprehensive analysis of the military communications market from 2012-2022

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You will discover 151 tables, charts, and graphs that quantify, analyse and forecast the military communications market from 2012-2022

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You will discover forecasts and analysis for 5 submarkets of the military communications market between 2012-2022

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Tactical Radios, Data Links & Terminals

Technical Services & Support

Encryption, Intercept and Jamming Systems

System Components

You will be presented with forecasts for the 14 leading national military communications markets, as well as rest of the world figures and projections for the period 2012-2022

US

China

UK

France

Italy

Germany

Russia

India

Japan

Australia

South Korea

Israel

Saudi Arabia

Turkey

Rest of the World (ROW)

You will receive a SWOT analysis that examines the military communications market from 2012-2022

You will find profiles of 40 leading companies operating within the military communications market

### **What is the structure of the report?**

Chapter 1 is the executive summary.

Chapter 2 of this report provides an introduction to military communications.

Chapter 3 the chapter offers an overview of the global military communications market, providing sales forecasts and worldwide analysis of growth over the period 2012 to 2022.

Chapter 4 focuses on five leading submarkets that make up the global market for military communications, with details of relevant developments and explanatory analysis, alongside sales forecasts for the period 2012 to 2022.

Chapter 5 focuses on fourteen leading national markets for military communications, with details of significant developments and accompanying sales forecasts for the period 2012 to 2022.

Chapter 6 provides a SWOT analysis, discussing the main strengths, weaknesses, opportunities and threats to the global military communications market.

Chapter 7 features interviews with two experts with experience of working in the military communications sector.

Chapter 8 profiles 40 leading companies involved in the global military communications marketplace.

Chapter 9 is a summary of the report, outlining the main conclusions of the analyses.

Chapter 10 is a glossary of acronyms used in the report.

**You can order this report today.**

Anyone with an interest in the direction of the armoured vehicles market should acquire the information and insight provided by this new report.

Gain an understanding of how to tap into the potential of this market by ordering *The Military Communications & COTS Market 2012-2022*.

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## **COMPANIES LISTED**

Advanced Control Components Inc (ACC)

Aeromaritime Systembau GMBH

AgustaWestland  
Al Yah Satellite Communications Company (Yahsat)  
Alcatel-Lucent  
AMERICOM Government Services Inc (AGS)  
Artel Inc  
Aselsan AS  
Astrium  
Astrium UK  
ATK Space Systems  
Atlas Communications  
Avaya Federal Solutions Inc  
BAE Systems  
BAE Systems Australia  
BAE Systems Inc.  
BAE Systems Information & Electronic Systems Integration  
Ball Aerospace & Technologies Corporation  
Boeing Company  
Boeing Defence Australia Ltd  
Boeing Defense, Space & Security (BDS)  
Boeing Network & Space Systems (N&SS)  
Boeing Network & Space Systems (N&SS), Network and Tactical Systems  
Boeing Network & Space Systems (N&SS), Space and Intelligence Systems  
Boeing Satellite Systems  
Bombardier Inc  
China Satellite Communications Company Ltd  
Cisco Systems Inc  
Cobham Plc  
Cobham Sensor Systems  
COM DEV Canada  
COM DEV Europe  
COM DEV International Ltd  
COM DEV International Products  
COM DEV USA  
Comtech Communications Corporation  
Data Link Solutions Inc (DLS)  
DataPath Inc  
DCNS  
Deloitte  
DRS Technologies Inc

E2v Technologies Plc  
EADS Astrium  
EADS Astrium France  
EADS Astrium Services  
EADS Astrium Services  
EADS Cassidian  
EADS Cassidian- Defence Electronics  
EF Johnson Technologies Inc  
Elbit Systems Land and C4I-Tadiran Ltd  
Elbit Systems Ltd  
Electrobit Corporation  
Elisra  
EM Solutions Pty Ltd  
Emrise Corporation  
EMS Defense & Space (D&S)  
EMS Technologies Inc  
European Aeronautic Defence and Space Company (EADS)  
Finmeccanica Group  
Finmeccanica SpA  
FUNA International  
General Dynamics C4 Systems (GDC4S)  
General Dynamics Corporation  
General Dynamics Information Systems and Technology  
General Dynamics SATCOM Technologies Inc  
General Dynamics UK Ltd  
Gilat Satellite Networks  
Globecomm Government Communications  
Globecomm Systems Inc  
Harris Corporation  
Honeywell International  
Howaldtswerke-Deutsche Werft (HDW)  
Hughes Communications Inc  
Hughes Corporation  
Hughes Defense and Intelligence Systems  
Hughes Network Systems LLC  
Huneeed Technologies  
Immarsat Plc  
Indra Sistemas SA  
Intelsat General Corporation

Intelsat Ltd  
ITT Communications Systems  
ITT Corporation  
ITT Exelis  
ITT Systems Corporation  
Janus Research Group Inc  
Juniper Networks Inc  
L-3 Communication Systems  
L-3 Communications Holdings Inc  
L3 Communications Systems-West  
L-3 Global Communications Solutions Inc  
Larsen & Toubro Ltd.  
LIGNex1  
Lockheed Martin Corporation  
Lockheed Martin Information Systems & Global Services  
Lockheed Martin Space Systems Company  
London Satellite Exchange Ltd  
Loral Space and Communications  
Mantech International Corporation  
Mantech Support Technology  
Mayflower Communications Company Inc  
McNeal Pro  
Mitsubishi Electric Corporation  
Mubadala Development Company  
National Research Institute of Electronics and Cryptology  
Network-Centric Solutions  
Northrop Grumman Aerospace Systems  
Northrop Grumman Cobham Intercoms LLC (NGCI)  
Northrop Grumman Corporation  
O'Neil & Associates Inc  
Orbital Sciences Corporation  
Pacific Star Communications Inc (PacStar)  
Paradigm Secure Communications Ltd  
PE Systems  
Rafael Advanced Defence Systems  
Raytheon Australia  
Raytheon BBM Technologies Corporation  
Raytheon BBN Technologies  
Raytheon Company

Raytheon Integrated Defense Systems  
Raytheon Network Centric Systems (NCS)  
Rockwell Collins Inc  
Rockwell Collins Satellite Communications Systems  
Rohde & Schwarz  
Roketsan  
Rolta India  
Samsung Thales  
Science Applications International Corporation (SAIC)  
SELEX Elsag  
SELEX Galileo  
SES AMERICOM  
SES ASTRA  
SES Government Solutions  
SES WORLD SKIES  
Sikorsky  
Space Systems  
Spectrum Signal Processing  
Stratos Global Corporation  
SWE-DISH Satellite Systems AB  
Tadiran Electronic Systems Ltd  
Tampa Microwave  
Telecommunications Systems (TCS)  
Telespazio SpA  
Thales Alenia Space  
Thales Alenia Space Espana  
Thales Alenia Space France  
Thales Alenia Space Italia  
Thales Communications Inc  
Thales Deutschland  
Thales Group  
Thales Iridium  
Trans-Tel Central  
Trivec Avant (Trivant)  
Turksat AS  
Ultra Electronics  
Ultra Electronics 3eTI  
Ultra Electronics Advanced Tactical Systems  
Ultra Electronics AMI



Ultra Electronics Command & Control Systems  
Ultra Electronics Communication & Integrated Systems  
Ultra Electronics Criticom  
Ultra Electronics Tactical Communication Systems  
Ultra Electronics, Aircraft & Vehicle Systems  
Ultra Electronics, Information & Power Systems  
Ultra Electronics, Tactical & Sonar Systems  
United Launch Alliance  
US Space  
Vecima Networks Inc  
VEGA Space Ltd  
ViaSat Inc  
Xylem Inc.

## **GOVERNMENT AGENCIES AND OTHER ORGANISATIONS MENTIONED IN THIS REPORT**

Australian Defence Force (ADF)  
Australian Defence Materiel Organisation (DMO)  
Australian Department of Defence  
Australian Military Procurement Organisation  
Bangladesh Navy  
Belgian Space Authority (SPACEBEL)  
Belgium Air Component (COMOPSAIR)  
Brazilian Air Force  
Brazilian Army  
Brazilian Ministry of Defence (MoD)  
British Embassy in the Democratic Republic of Congo.  
Bulgarian Air Force  
Canadian Department of National Defence (DND)  
Canadian Forces Air Command (AIRCOM)  
Canadian Forces Maritime Command (MARCOM)  
Cape Canaveral Air Force Station Space Launch Complex  
Chilean Navy  
Chinese National People's Congress  
European Defence Agency (EDA)  
European Parliament  
European Space Agency (ESA)  
Finnish Defence Force

Fort Bliss  
French Air Force  
French Army  
French Defence Procurement Agency (DGA)  
French Ministry of Defence (MoD)  
French Ministry of Defence (MoD), Inter-Forces Infrastructure, Networks and Information Systems Department (DIRISI)  
French Naval Aviation  
French Navy  
French Space Agency (CNES)  
German Air Force  
German Army  
German Bundeswehr  
German Federal Office of the Bundeswehr for Information Management and Information Technology (IT-AmtBw)  
HMAS Harman  
Indian Ministry of Defence (MoD)  
Indian Space Research Organisation (ISRO)  
International Security Assistance Force (ISAF)  
Israeli Air Force (IAF)  
Israeli Defence Force (IDF)  
Italian Army  
Italian Ministry of Defence (MoD)  
Italian Space Agency (ASI)  
Japanese Ministry of Defence  
Japanese National Defence Programme  
Joint Improvised Explosive Devices Defeat Organisation (JIEDDO)  
Lithuanian Air Force  
NATO Air Command and Control System Management Agency (NACMA)  
NATO CIS Agency (NCSA)  
NATO Response Force (NRF)  
New Zealand Defence Force (NZDF)  
North Atlantic Treaty Organization (NATO)  
Norwegian Army  
Organisation for Joint Armament Co-operation (OCCAR)  
People's Liberation Army (PLA)  
Polish Ministry of National Defence  
Republic of Korea Army (ROKA)  
Republic of Korea Defence Acquisition Program Administration (DAPA)

Romanian Air Force  
Romanian Army  
Royal Australian Navy (RAN)  
Royal Canadian Navy  
Royal Danish Air Force  
Royal Netherlands Air Force (RNLAf)  
Royal Norwegian Navy  
Royal Norwegian Navy  
Royal Saudi Naval Force (RSNF)  
Russian Ministry of Defence (MoD)  
Saudi Arabian Border Guard  
Spanish Ministry of Defence  
Swedish Armed Forces  
The Defense Technical Information Center (DTIC)  
Turkish Armed Forces (TAF)  
Turkish Ministry of National Defence  
Turkish Undersecretariat for Defence Industries (SSM)  
UK Defence Equipment and Support (DE&S)  
UK Ministry of Defence (MoD)  
UK Royal Navy (RN)  
UK Serious Fraud Office  
UN Security Council (UNSC)  
United Arab Emirates (UAE) Armed Forces  
United Arab Emirates (UAE) Navy  
US Air Force (USAF)  
US Air Force (USAF), Space and Missile Systems Center (SMC)  
US Air Force (USAF), Space and Missile Systems Centre (SMC) MILSATCOM Systems Directorate  
US Air Force National Guard  
US Armed Forces Radio & Television Service (AFRTS)  
US Army  
US Army National Guard  
US Army Network Integration Executive (NIE)  
US Army Program Executive Office Enterprise Information Systems (PEO EIS)  
US Army Project Manager Defense Communications and Army Transmission Systems (PM DCATS)  
US Army Research, Development and Engineering Command (RDECOM)  
US Army Space and Missile Defense Command- Army Forces Strategic Command (USASMD/ ARSTRAT)

US Army Wideband Satellite Communications Operations Centre  
US Coast Guard (USCG)  
US Congress  
US Congress Joint Select Committee on Deficit Reduction  
US Defense Advanced Research Projects Agency (DARPA)  
US Defense Communications and Army Transmission Systems (PM DCATS) office  
US Defense Information Systems Agency (DISA)  
US Defense Information Technology Contracting Organization (DITCO)  
US Defense Security Cooperation Agency (DSCA)  
US Department of Defense (DoD)  
US Department of Homeland Security  
US Department of State  
US Federal Aviation Administration (FAA)  
US Forces Korea (USFK)  
US Future COMSATCOM Services Acquisition (FCSA)  
US General Services Administration (GSA)  
US Joint Program Executive Office (JPEO) Joint Tactical Radio System (JTRS)  
US Joint Programme Executive Office (JPEO)  
US Marine Corps (USMC)  
US National Aeronautics and Space Administration (NASA)  
US National Reconnaissance Office (NRO)  
US Naval Air Systems Command (NAVAIR)  
US Naval and Telecommunications Area Master Station Pacific  
US Naval Construction Force  
US Naval Sea Systems Command  
US Navy (USN)  
US Navy (USN), Military Sealift Command (MSC)  
US Navy (USN), Space and Naval Warfare Systems Command (SPAWAR)  
US Patent and Trademark Office  
US Pentagon  
US Senate  
US Special Operations Command (SOCOM)  
US Special Operations Command (SOCOM) 75th Ranger Regiment  
US Vehicular Intercom Systems Office (VISO)  
US Whitehouse Communications Agency  
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