

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.?

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

You will receive forecasts and analysis of the global military communications market between 2012-2022

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

Satellite Communications Terminals & Systems

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
White Sands Missile Range
Xichang Satellite Launch Centre

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