

The Military Simulation and Virtual Training Market 2012-2022

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Abstracts

Simulation technology has traditionally been a resilient and stable market due to the essential requirement for flight simulation trainers for the world's air forces; however, technological developments in emerging submarkets have acted to spur extensive growth within a diverse range of simulation and training areas. These advances have led many major nations to purchase military simulation technology, viewing it as an essential component in their military capabilities. As a consequence, Visiongain has determined that the value of the global military simulation and virtual training market in 2012 will reach \$9.03bn.

COTS providers ensure that technological growth is proceeding at an immense pace. Whilst the defence industry was initially a key pioneer in computing technology; growth in the civilian sector has meant that advances in the civilian technology sector have, in many cases, outstripped the defence industry. The military simulation and virtual training market has consequently become far more pluralistic in terms of suppliers and numerous opportunities exist to invest in smaller niche firms.

Visiongain anticipates that the COTS phenomenon will lead to increased growth in the number of providers of military simulation products. The military simulation market will increasingly demand greater realism in its simulated environments, which will provide opportunities for smaller firms to remain competitive against companies with a major market presence. Further, Visiongain anticipates a growing role for joint ventures in providing market access to emerging markets.

The military simulation market will continue to be led by the US and major European states, however their position as leading national markets will be challenged by emerging powers in the Middle East and Asia in the years to come. The rising economic

powers of Asia will represent a strong element of the growth which will drive the military simulation market throughout the decade.

The report contains 200 tables, charts and graphs that add visual analysis in order to explain developing trends within the military simulation and virtual training market. Visiongain provides forecasts for the period 2012-2022 in terms of value (US\$) for the global military simulation and virtual training market, as well as for 12 submarkets (High Performance Jet, Rotary Wing, Transport Aircraft, Unmanned Aerial Vehicles, Other (Flight), Combat, Maintenance, Vehicles, Cultural Language and Intelligence, Medical, Command & Modelling, Naval) of the military simulation and virtual training market. In addition, 15 leading national military simulation and virtual training markets are forecast and analysed by Visiongain over the period 2012-2022. The report also provides profiles of 66 leading companies operating within the market, and includes 5 exclusive interviews with principal military simulation and virtual training companies, providing expert insight alongside Visiongain analysis.

Unique Selling Points

You will gain an understanding of the military simulation and virtual training market and learn how it will evolve over the next decade, with detailed global sales forecasts from 2012 to 2022.

You will receive national sales forecasts for the 15 largest military simulation and virtual training markets for 2012-2022, and gain insight into the specific market drivers and restraints in each national market.

You will also receive sales forecasts and analysis for 12 submarkets within the global military simulation and virtual training market:

The forecasts and analysis are underpinned by extensive expert consultation. Transcripts of 5 interviews are included within the report with expert insight from:

You will be able to study 200 tables, charts and graphs quantifying the military simulation and virtual training market in detail over the period 2012-2022.

You will gain knowledge of who the leading players are within the military simulation and virtual training marketplace with profiles of 66 leading companies

You will receive a SWOT analysis for strengths, weaknesses, opportunities and

threats to the military simulation and virtual training market from 2012 onwards.

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 simulation and virtual training 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 simulation and virtual 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 Simulation and Virtual Training Market 2012-2022

You will receive a comprehensive analysis of the military simulation and virtual market from 2012-2022

The analysis and forecasting has been informed by extensive expert consultation with industry leaders. Within the report, you will be able to read full transcripts of interviews from 5 leading companies involved within the military simulation and virtual training market.

Boeing Training Systems and Government Services

MYMIC LLC

NGRAIN

Meggitt Training Systems

Intelligent Decisions

You will find 200 tables, charts, and graphs that quantify, analyse and forecast

the military simulation and virtual training market from 2012-2022

You will receive forecasts and analysis of the global military simulation and virtual training market between 2012-2022

You will find forecasts and analysis of 12 military simulation and virtual training submarkets over the period 2012-2022

High Performance Jet

Rotary Wing

Transport Aircraft

Unmanned Aerial Vehicles

Other

Combat

Maintenance

Vehicles

Cultural, Language and Intelligence

Medical

Command & Modelling

Naval

You will be presented with forecasts for the 15 leading national military simulation and virtual training markets, as well as rest of the world figures and projections for the period 2012-2022

US

UK

China

France

Germany

Canada

Italy

Israel

Russia

Australia

India

Saudi Arabia

Japan

The Netherlands

South Korea

Rest of the World

You will receive a SWOT analysis that examines the Military Simulation and Virtual Training market from 2012-2022

You will gain profiles of 66 leading companies operating within the Military Simulation and Virtual Training market

What is the structure of the report?

Chapter 1 comprises the executive summary and outline of the report.

Chapter 2 of this report offers an introduction to the military simulation and virtual training market.

Chapter 3 provides an overview of the military simulation and virtual training market. This chapter provides spending forecasts and analysis of growth over the period 2012 to 2022 for the global military simulation and virtual training market, as well analyses of the fastest growing military simulation and virtual training submarkets and national markets. The chapter also analyses the market share of each military simulation and virtual training submarket and national market over the forecast period. Lastly, cumulative sales for the global military simulation and virtual training market, submarkets, and national markets are analysed.

Chapter 4 focuses on 12 submarkets that constitute the military simulation and virtual training market, plus the total flight and non-flight military simulation and virtual training markets. The chapter provides spending forecasts for each of these submarkets for the period 2012 to 2022.

Chapter 5 focuses on 15 leading national military simulation and virtual training markets, plus the rest of the world (RoW) market, that combine to form the global military simulation and virtual training market.

The chapter includes details of significant developments, contracts, and accompanying national spending forecasts for the period 2012 to 2022.

Chapter 6 supplies a SWOT analysis, discussing the main strengths, weaknesses, opportunities and threats to the military simulation and virtual training market in the period 2012-2022.

Chapter 7 features 5 interviews from leading company experts within the field of military simulation and virtual training:

Chapter 8 outlines and profiles 66 major defence companies and institutions operating within the military simulation and virtual training market.

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

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

You can order this report today

Anyone with an interest in the military simulation and virtual training market should gain valuable information and insight from this new study by visiongain, which analyses one of the most exciting markets in the military simulation and virtual training market. Military simulation and virtual training offer substantial business and investment opportunities and are becoming an increasingly important component of the military simulation and virtual training market in several key regional markets.

This visiongain defence report will be valuable both to those already involved in the military simulation and virtual training market and those wishing to enter the market in the future. Gain an understanding of how to tap into the potential of this market by ordering *The Military Simulation and Virtual Training Market 2012-2022*

Contents

1. EXECUTIVE SUMMARY

- 1.1 The Military Simulation and Virtual Training Market 2012-2022
- 1.2 Drivers and Restraints of the Military Simulation and Virtual Training Market 2012-2022
- 1.3 Report Benefits and Highlights
- 1.4 Report Structure
- 1.5 Methodology
- 1.6 Global Military Simulation and Virtual Training Market Forecast 2012-2022
- 1.7 Flight and Non-Flight Military Simulation and Virtual Training Submarket Forecasts 2012-2022
- 1.8 Military Simulation and Virtual Training Submarket Forecasts 2012-2022
- 1.9 Leading National Military Simulation and Virtual Training Market Forecasts 2012-2022

2. INTRODUCTION TO THE MILITARY SIMULATION AND VIRTUAL TRAINING MARKET

- 2.1 Military Simulation and Virtual Training: Roles and Prospects
- 2.2 Definitions
 - 2.2.1 Defining the Military Simulation and Virtual Training Market
 - 2.2.2 Defining Terms
- 2.3 Types of Military Simulation Training
 - 2.3.1 Predictive Simulations
 - 2.3.2 Virtual Simulations
 - 2.3.3 Gaming Technology
- 2.4 Supporting Arms Simulation Training
 - 2.4.1 Medical Simulation
 - 2.4.2 Technical and Maintenance Procedural Training
 - 2.4.3 Cultural Interaction Training
- 2.5 Current Trends
 - 2.5.1 Deployable Technologies
 - 2.5.2 Embedded Simulation
 - 2.5.3 Commercial Off The Shelf Simulation Solutions

3. THE GLOBAL MILITARY SIMULATION AND VIRTUAL TRAINING MARKET 2012-2022

- 3.1 Global Military Simulation and Virtual Training Market Forecast 2012-2022
- 3.2 Global Military Simulation and Virtual Training Market Analysis
- 3.3 Fastest Growing Military Simulation and Virtual Training Submarkets
 - 3.3.1 Fastest Growing Military Simulation and Virtual Training Submarkets 2012-2022
 - 3.3.2 Fastest Growing Military Simulation and Virtual Training Submarkets 2012-2017
 - 3.3.3 Fastest Growing Military Simulation and Virtual Training Submarkets 2017-2022
- 3.4 Fastest Growing Leading Military Simulation and Virtual Training National Markets
 - 3.4.1 Fastest Growing Leading National Military Simulation and Virtual Training Markets 2012-2022
 - 3.4.2 Fastest Growing Leading National Military Simulation and Virtual Training Markets 2012-2017
 - 3.4.3 Fastest Growing Leading National Military Simulation and Virtual Training Markets 2017-2022
- 3.5 Military Simulation and Virtual Training Submarket Shares
 - 3.5.1 Military Simulation and Virtual Training Flight and Non-flight Comparison 2012-2022
 - 3.5.2 Military Simulation and Virtual Training Flight Submarket Share Analysis 2012-2022
 - 3.5.3 Military Simulation and Virtual Training Non-flight Submarket Share Analysis 2012-2022
- 3.6 Leading Military Simulation and Virtual Training National Market Share Forecasts 2012-2022
- 3.7 Military Simulation and Virtual Training Market Cumulative Sales 2012-2022
 - 3.7.1 Military Simulation and Virtual Training Submarket Cumulative Sales 2012-2022
 - 3.7.2 Leading National Military Simulation and Virtual Training Markets Cumulative Sales 2012-2022

4. MILITARY SIMULATION AND VIRTUAL TRAINING SUBMARKETS 2012-2022

- 4.1 Flight and Non-flight Military Simulation and Virtual Training Submarket Comparison 2012-2022
- 4.2 Flight Military Simulation and Virtual Training Submarkets
 - 4.2.1 Flight Military Simulation and Virtual Training Market Forecast 2012-2022
 - 4.2.2 High Performance Jet Military Simulation and Virtual Training Submarket
 - 4.2.2.1 High Performance Jet Military Simulation and Virtual Training Submarket Forecast 2012-2022
 - 4.2.2.2 High Performance Jet Military Simulation and Virtual Training Submarket Analysis

- 4.2.3 Rotary Wing Military Simulation and Virtual Training Submarket
 - 4.2.3.1 Rotary Wing Military Simulation and Virtual Training Submarket Forecast 2012-2022
 - 4.2.3.2 Rotary Wing Military Simulation and Virtual Training Submarket Analysis
- 4.2.4 Transport Aircraft Military Simulation and Virtual Training Submarket
 - 4.2.4.1 Transport Aircraft Military Simulation and Virtual Training Submarket Forecast 2012-2022
 - 4.2.4.2 Transport Aircraft Military Simulation and Virtual Training Submarket Analysis
- 4.2.5 UAV Military Simulation and Virtual Training Submarket
 - 4.2.5.1 UAV Military Simulation and Virtual Training Submarket Forecast 2012-2022
 - 4.2.5.2 UAV Military Simulation and Virtual Training Submarket Analysis
- 4.2.6 Other (Flight) Military Simulation and Virtual Training Submarket
 - 4.2.6.1 Other (Flight) Military Simulation and Virtual Training Submarket Forecast 2012-2022
 - 4.2.6.2 Other (Flight) Military Simulation and Virtual Training Submarket Analysis
- 4.3 Non-Flight Military Simulation and Virtual Training Submarkets
 - 4.3.1 Non-Flight Military Simulation and Virtual Training Market Forecast 2012-2022
 - 4.3.2 Combat Military Simulation and Virtual Training Submarket
 - 4.3.2.1 Combat Military Simulation and Virtual Training Submarket Forecast 2012-2022
 - 4.3.2.2 Combat Military Simulation and Virtual Training Submarket Analysis
 - 4.3.3 Naval Military Simulation and Virtual Training Submarket
 - 4.3.3.1 Naval Military Simulation and Virtual Training Submarket Forecast 2012-2022
 - 4.3.3.2 Naval Military Simulation and Virtual Training Submarket Analysis
 - 4.3.4 Vehicles Military Simulation and Virtual Training Submarket
 - 4.3.4.1 Vehicles Military Simulation and Virtual Training Submarket Forecast 2012-2022
 - 4.3.4.2 Vehicles Military Simulation and Virtual Training Submarket Analysis
 - 4.3.5 Medical Military Simulation and Virtual Training Submarket
 - 4.3.5.1 Medical Military Simulation and Virtual Training Submarket Forecast 2012-2022
 - 4.3.5.2 Medical Military Simulation and Virtual Training Submarket Analysis
 - 4.3.6 Command & Modelling Military Simulation and Virtual Training Submarket
 - 4.3.6.1 Command & Modelling Military Simulation and Virtual Training Submarket Forecast 2012-2022
 - 4.3.6.2 Command & Modelling Military Simulation and Virtual Training Submarket Analysis
 - 4.3.7 Maintenance Military Simulation and Virtual Training Submarket
 - 4.3.7.1 Maintenance Military Simulation and Virtual Training Submarket Forecast

2012-2022

4.3.7.2 Maintenance Military Simulation and Virtual Training Submarket Analysis

4.3.8 Cultural, Language & Intelligence Military Simulation and Virtual Training Submarket

4.3.8.1 Cultural, Language & Intelligence Military Simulation and Virtual Training Submarket Forecast 2012-2022

4.3.8.2 Cultural, Language & Intelligence Military Simulation and Virtual Training Submarket Analysis

5. LEADING NATIONAL MILITARY SIMULATION AND VIRTUAL TRAINING MARKETS 2012-2022

5.1 US Military Simulation and Virtual Training Market

5.1.1 US Military Simulation and Virtual Training Market Forecast 2012-2022

5.1.2 US Military Simulation and Virtual Training Market Analysis

5.1.3 US Military Simulation and Virtual Training Organisations and Structures

5.1.4 US Military Simulation and Virtual Training Market Contracts

5.1.4.1 Veterans Affairs Medical Simulators

5.1.4.2 Dismounted Soldier Training System

5.1.4.3 Man-Portable Aircraft Survivability Trainer (MAST)

5.1.4.4 CAE / Abrams Tank Maintenance Simulator

5.1.4.5 RDECOM- STTC Medical Simulation

5.1.4.6 Aviation Combined Arms Tactical Trainer (AVCATT)

5.1.4.7 NCM3- SAIC

5.1.4.8 Medical Simulation Training Centres (MSTC)

5.1.4.9 Synthetic Environment Core

5.1.4.10 C-130J Weapons Trainer System

5.1.4.11 CAE / Boeing M-346 Fighter Jet Simulators

5.1.4.12 US Army Forces Command (FORSCOM) Simulation Services

5.1.4.13 Tank-Automotive and Armaments Command Simulators

5.1.4.14 C-5 Galaxy Weapon Systems Trainer

5.1.4.15 National Flight Academy- Prepar3D

5.1.4.16 Grand Forks Air Base- L-3 Link & UND

5.1.4.17 SDS ROVATTS

5.1.4.18 Tactical Operational Flight Trainers (TOFT)

5.1.4.19 NAWCTSD- Littoral Officer Training

5.1.4.20 Enhanced Company Operations (ECO) Simulation System

5.1.4.21 Marine Operator Driving Simulators (ODS)

5.1.4.22 USMC- Adacel Air Traffic Control Simulator

- 5.1.4.23 CAE NAWCTSD Simulator Maintenance
- 5.1.4.24 CSC Contracts to US Navy
- 5.1.4.25 L-3 Communications Link MTC Contract
- 5.1.4.26 Northrop Grumman CTTR Contract
- 5.1.4.27 CACI FAST Contract
- 5.1.4.28 L-3 Link F-16 Training Contract
- 5.1.4.29 CAE HIMARS MTS Contract
- 5.1.4.30 CAE UH-72A EADS Contract
- 5.1.4.31 CAE KC-135 OFT Contract
- 5.1.4.32 Decisive Action Training Environment (DATE)
- 5.1.5 Known Current STOC II Contractors
- 5.2 UK Military Simulation and Virtual Training Market
 - 5.2.1 UK Military Simulation and Virtual Training Market Forecast 2012-2022
 - 5.2.2 UK Military Simulation and Virtual Training Market Analysis
 - 5.2.3 UK Military Simulation and Virtual Training Market Contracts
 - 5.2.3.1 Wildcat Training Centre
 - 5.2.3.2 British Royal Navy Lynx Helicopter Training System
 - 5.2.3.3 British Army- Cubic Area Weapons Effects Simulator (AWES)
 - 5.2.3.4 CAE / Cobham Aviation Services- Tactical Mission Training
 - 5.2.3.5 Future Tanker Aircraft Programme
 - 5.2.3.6 CAE Upgrading Puma Training
 - 5.2.3.7 Thales Contract for Type-45 3D Training
 - 5.2.3.8 Saab Training Support
 - 5.2.3.9 Saab Contract Extended for Tactical Engagement Simulation
 - 5.2.3.10 Metrix Consortium
 - 5.2.3.11 FB Heliservices Training Contract
 - 5.2.3.12 Saab Contract Extended for Counter-IED Training
 - 5.2.3.13 Systematic To Support ISTAR Simulation
- 5.3 Chinese Military Simulation and Virtual Training Market
 - 5.3.1 Chinese Military Simulation and Virtual Training Market Forecast 2012-2022
 - 5.3.2 Chinese Military Simulation and Virtual Training Market Analysis
 - 5.3.3 Chinese Military Simulation and Virtual Training Market Contracts
 - 5.3.3.1 Glorious Mission Video Gaming
 - 5.3.3.2 Second Artillery Command Academy
 - 5.3.3.3 Army Aviation Academy
 - 5.3.3.4 Naval University of Engineering
- 5.4 French Military Simulation and Virtual Training Market
 - 5.4.1 French Military Simulation and Virtual Training Market Forecast 2012-2022
 - 5.4.2 French Military Simulation and Virtual Training Market Analysis

- 5.4.3 French Military Simulation and Virtual Training Market Contracts
 - 5.4.3.1 SCIPPO
 - 5.4.3.2 Tiger Aircrew Training Means (TATM)
 - 5.4.3.3 Gavap - CENZUB Urban Warfare System
 - 5.4.3.4 Sogitec Industries - NH90 Simulators Contract
- 5.5 German Military Simulation and Virtual Training Market
 - 5.5.1 German Military Simulation and Virtual Training Market Forecast 2012-2022
 - 5.5.2 German Simulation and Virtual Training Market Analysis
 - 5.5.3 German Military Simulation and Virtual Training Market Contracts
 - 5.5.3.1 Barco / CAE- German Army Aviation School
 - 5.5.3.2 CAE Simulators
- 5.6 Canadian Military Simulation and Virtual Training Market
 - 5.6.1 Canadian Military Simulation and Virtual Training Market Forecast 2012-2022
 - 5.6.2 Canadian Military Simulation and Virtual Training Market Analysis
 - 5.6.3 Canadian Military Simulation and Virtual Training Market Contracts
 - 5.6.3.1 Caesar Trauma Patient Health Simulator
 - 5.6.3.2 Michener Centre for the Advancement of Simulation and Education
 - 5.6.3.3 Canadian Air Force Integrated Information and Learning Environment
 - 5.6.3.4 CAE CC-130J Contract
 - 5.6.3.5 CAE CH-147F Chinook Contract
 - 5.6.3.6 CAE CC-130H & CH-146 Contract
- 5.7 Australian Military Simulation and Virtual Training Market
 - 5.7.1 Australian Military Simulation and Virtual Training Market Forecast 2012-2022
 - 5.7.2 Australian Military Simulation and Virtual Training Market Analysis
 - 5.7.3 Australian Military Simulation and Virtual Training Market Contracts
 - 5.7.3.1 RAAF- Adacel
 - 5.7.3.2 RAAF- Super Hornets
 - 5.7.3.3 CryEngine3- Landing Helicopter Dock Ships
 - 5.7.3.4 Raytheon F/A-18F Training Contract
 - 5.7.3.5 AIR 5431 & AIR 9000
 - 5.7.3.6 JP 2048
- 5.8 Indian Military Simulation and Virtual Training Market
 - 5.8.1 Indian Military Simulation and Virtual Training Market Forecast 2012-2022
 - 5.8.2 Indian Military Simulation and Virtual Training Market Analysis
 - 5.8.3 Indian Military Simulation and Virtual Training Market Contracts
 - 5.8.3.1 HATSOFF Simulator Cockpit
 - 5.8.3.2 T-90/ T-72 Tank Simulators
 - 5.8.3.3 Spatial Disorientation Training Simulator
 - 5.8.3.4 Wipro / CAE Partnership

5.8.3.5 Spike ATGM Simulators

5.8.3.6 UAV Simulator Procurement Planned

5.9 Italian Military Simulation and Virtual Training Market

5.9.1 Italian Military Simulation and Virtual Training Market Forecast 2012-2022

5.9.2 Italian Military Simulation and Virtual Training Market Analysis

5.9.3 Italian Military Simulation and Virtual Training Market Contracts

5.9.3.1 Italian C-27J Simulators

5.9.3.2 Italian Navy AW101 Simulator

5.10 Israeli Military Simulation and Virtual Training Market

5.10.1 Israeli Military Simulation and Virtual Training Market Forecast 2012-2022

5.10.2 Israeli Military Simulation and Virtual Training Market Analysis

5.10.3 Israeli Military Simulation and Virtual Training Market Contracts

5.10.3.1 Regavim Simulator Centre

5.10.3.2 IAF- Palmachim Simulators

5.11 Russian Military Simulation and Virtual Training Market

5.11.1 Russian Military Simulation and Virtual Training Market Forecast 2012-2022

5.11.2 Russian Military Simulation and Virtual Training Market Analysis

5.11.3 Russian Military Simulation and Virtual Training Market Contracts

5.11.3.1 Rheinmetall Russian Combat Training Centre

5.11.3.2 Russian / Indian Joint Ventures

5.12 Saudi Arabian Military Simulation and Virtual Training Market

5.12.1 Saudi Arabian Military Simulation and Virtual Training Market Forecast 2012-2022

5.12.2 Saudi Arabian Military Simulation and Virtual Training Market Analysis

5.12.3 Saudi Arabian Military Simulation and Virtual Training Market Contracts

5.12.3.1 DTM Global/ Rahaden Trading

5.12.3.2 VirTra Systems Simulators

5.12.3.3 Lockheed Martin Armoured Vehicle Simulators

5.12.3.4 Cubic Defense Applications Contract for Small Arms Trainer

5.12.3.5 Northrop Grumman Contract for Saudi Arabian National Guard

Modernisation

5.12.3.6 Lockheed Martin MILES Simulators

5.13 Netherlands Military Simulation and Virtual Training Market

5.13.1 Netherlands Military Simulation and Virtual Training Market Forecast 2012-2022

5.13.2 Netherlands Military Simulation and Virtual Training Market Analysis

5.13.3 Netherlands Military Simulation and Virtual Training Market Contracts

5.13.3.1 C-130 / KDC-10 Simulators - Royal Netherlands Air Force

5.13.3.2 CAE CH-47 'Chinook' Training Contract

5.13.3.3 Bohemia Interactive Simulations VBS2 Enterprise Licence

- 5.13.3.4 Rotorsim Joint NH90 Training Program Contract
- 5.13.3.5 ADMS Contract Awarded to ETC Simulation
- 5.14 Japanese Military Simulation and Virtual Training Market
 - 5.14.1 Japanese Military Simulation and Virtual Training Market Forecast 2012-2022
 - 5.14.2 Japanese Military Simulation and Virtual Training Market Analysis
 - 5.14.3 Japanese Military Simulation and Virtual Training Market Contracts
 - 5.14.3.1 Mitsubishi / CAE Joint Venture
- 5.15 South Korean Military Simulation and Virtual Training Market
 - 5.15.1 South Korean Military Simulation and Virtual Training Market Forecast 2012-2022
 - 5.14.2 South Korean Military Simulation and Virtual Training Market Analysis
 - 5.14.3 South Korean Military Simulation and Virtual Training Market Contracts
 - 5.14.3.1 Havelsan Simulators
 - 5.14.3.2 Republic of Korea WARSIM Programme
- 5.16 Rest of the World Military Simulation and Virtual Training Market
 - 5.16.1 Rest of the World Military Simulation and Virtual Training Market Forecast 2012-2022
 - 5.16.2 Rest of the World Military Simulation and Virtual Training Market Analysis
 - 5.16.3 Rest of the World Military Simulation and Virtual Training Market Contracts
 - 5.16.3.1 Danish Defence - IRAS
 - 5.16.3.2 Danish Defence - IFACTS
 - 5.16.3.3 Spain - Indra VICTRIX Spanish Army Simulators
 - 5.16.3.4 Turkey- Medallion TM-6000 Image Generators
 - 5.16.3.5 Moroccan T-6C Trainers
 - 5.16.3.6 Royal Brunei Armed Forces National Modelling and Simulation Centre
 - 5.16.3.7 Elbit Systems / Asian Army
 - 5.16.3.8 Malaysia- C-130H Simulator
 - 5.16.3.9 Malaysia- CAE 3000/ AW-139
 - 5.16.3.10 Taiwan- War Game Simulation
 - 5.16.3.11 Singapore Requests FMS Training Support
 - 5.16.3.12 CAE To Establish Multi-Purpose Training Centre in Brunei.
 - 5.16.3.13 CAE Contracts With Undisclosed Customers
 - 5.16.3.14 Havelsan Installs Azerbaijani Artillery Simulator
 - 5.16.3.15 Turkish Navy HeliSim Centre Operational
 - 5.16.3.16 A400M Maintenance Simulator Spanish Contract
 - 5.16.3.17 Cassidian Simulation Spanish Contract
 - 5.16.3.18 Cubic Awarded Lithuanian Modernisation Contract
 - 5.16.3.19 Elbit To Establish Macedonian Helicopter Private Training Centre
 - 5.16.3.20 Cubic Delivers Combat Training Centre to Jordan

5.16.3.21 King Abdullah Special Operations Training Centre

6. SWOT ANALYSIS OF THE MILITARY SIMULATION AND VIRTUAL TRAINING MARKET 2012-2022

6.1 Strengths

- 6.1.1 Cost-Effective
- 6.1.2 Multiple Scenario Options
- 6.1.3 Transportable and Deployable
- 6.1.4 Tactical and Doctrinal Development
- 6.1.5 Guaranteed Demand

6.2 Weaknesses

- 6.2.1 Quality of Training
- 6.2.2 Luxury Good
- 6.2.3 Weak Demand in Smaller Nations
- 6.2.4 Institutional Opposition

6.3 Opportunities

- 6.3.1 Market and Technological Openness
- 6.3.2 Emerging Markets
- 6.3.3 New Simulations
- 6.3.4 Troops Returning Home
- 6.3.5 Shift Towards 'On-Line' World

6.4 Threats

- 6.4.1 Constrained Government Budgets
- 6.4.2 Interoperability and Cost
- 6.4.3 Security of 'On- Line' Networks
- 6.4.4 Market Entry Restrictions

7. EXPERT OPINION

7.1 Intelligent Decisions (ID)

- 7.1.1 Floyd West Profile
- 7.1.2 Products
- 7.1.3 Simulation Technology and DOD Budgets
- 7.1.4 The Dismounted Soldier Program
- 7.1.5 Cloud Technology
- 7.1.6 Other Technological Developments
- 7.1.7 Market Restraints
- 7.1.8 Market Value

- 7.1.9 Foreign Markets
- 7.1.10 Future Prospects
- 7.1.11 Dismounted Soldier Training System Profile
- 7.2 MYMIC LLC
 - 7.2.1 Dr Tom Mastaglio Profile
 - 7.2.2 Customers & Markets
 - 7.2.3 Products and Focus
 - 7.2.4 MYMIC's SEELS
 - 7.2.5 Technological Opportunities and Limitations
 - 7.2.6 Medical Simulation Technology
 - 7.2.7 Significance of COIN Operations
- 7.3 NGRAIN
 - 7.3.1 Gabe Batstone Profile
 - 7.3.2 NGRAIN Product Range
 - 7.3.3 COTS Products
 - 7.3.4 Latest Research
 - 7.3.5 Future of Cloud Computing in Military Simulation
 - 7.3.6 NGRAIN Global Markets
 - 7.3.7 Adapting to Economic Climate
 - 7.3.8 Growth of Smaller Simulation Providers
 - 7.3.9 Business Collaboration
 - 7.3.10 Future of Simulation
 - 7.3.11 Simulation Growth Prospects
 - 7.3.12 Worldwide Growth
 - 7.3.13 Technological Developments
- 7.4 Boeing Training Systems and Government Services
 - 7.4.1 Boeing TSGS & Ongoing Projects
 - 7.4.2 Economic Downturn
 - 7.4.3 Restraints and Industry Response
 - 7.4.4 Future of Simulation
 - 7.4.5 Industry Developments
- 7.5 Meggitt Training Systems
 - 7.5.1 Ron Vadas Profile
 - 7.5.2 Product Range
 - 7.5.3 Company Focus
 - 7.5.4 Customer and Operating Locations
 - 7.5.5 Future Sales
 - 7.5.6 Market Trends
 - 7.5.7 Technological Challenges & Opportunities

7.5.8 Current Project

8. LEADING COMPANIES IN THE MILITARY SIMULATION AND VIRTUAL TRAINING MARKET

- 8.1 AAI Corporation
- 8.2 Adacel
- 8.3 AEGIS Technologies
- 8.4 Alelo Inc
- 8.5 Antycip Simulation
- 8.6 Australian Unmanned Systems Academy
- 8.7 BAE Systems
- 8.8 Beijing TT Aviation Technology
- 8.9 Boeing Training Systems & Services (TSGS)
- 8.10 CAE Inc.
- 8.11 Caspian Learning
- 8.12 Christy Aerospace & Technology
- 8.13 Cubic Defense Applications (CDA)
- 8.14 EADS Cassidian
- 8.15 EDM Ltd
- 8.16 Elbit Systems Ltd
- 8.17 Environmental Tectonics Corporation (ETC)
- 8.18 Equipe Simulation
- 8.19 eSim Games
- 8.20 Flight Safety International Inc.
- 8.21 General Dynamics Information Technology (GDIT)
- 8.22 H-Sim
- 8.23 Indra
- 8.24 ING Engineering Inc.
- 8.25 InVisM
- 8.26 Intelligent Decisions
- 8.27 Israel Aerospace Industries (IAI)
- 8.28 Jackson State University
- 8.29 Janus Research Group
- 8.30 Kansas State University College of Technology and Aviation
- 8.31 LaserShot
- 8.32 L-3 Link Simulation & Training
- 8.33 Lockheed Martin Simulation, Training & Support (LMSTS)
- 8.34 MASA Group

- 8.35 Meggitt Training Systems
- 8.36 MetaVR
- 8.37 Military Moulage Combat Injury Simulation
- 8.38 MLB Company
- 8.39 MYMIC LLC
- 8.40 National Aerospace Laboratory
- 8.41 Newman & Spurr Consultancy
- 8.42 NGRain
- 8.43 Opal-RT Technologies
- 8.44 Presagis
- 8.45 Prescient Systems & Technologies
- 8.46 QinetiQ
- 8.47 Quantum3D
- 8.48 Ramora UK
- 8.49 Raytheon Technical Services (TS)
- 8.50 Rheinmetall Defence
- 8.51 Robonic Ltd Oy
- 8.52 Rockwell Collins Inc.
- 8.53 RTDynamics
- 8.54 Saab Training Systems
- 8.55 Science Applications International Corporation (SAIC)
- 8.56 SimplySim
- 8.57 Silicon Valley Simulation
- 8.58 Singapore Technologies Engineering
- 8.59 Systematic
- 8.60 Tactical Communications Group
- 8.61 Thales Training & Simulation
- 8.62 UTEC Flight Training
- 8.63 University of Minnesota
- 8.64 Viking Aerospace LLC
- 8.65 Wright State University
- 8.66 Zen Technologies

9. CONCLUSION

- 9.1 The Future of the Military Simulation and Virtual Training Market
- 9.2 Military Simulation and Virtual Training Market Forecast 2012-2022
- 9.3 Flight and Non-Flight Military Simulation and Virtual Training Market Forecasts 2012-2022

9.4 Military Simulation and Virtual Training Submarket Forecasts 2012-2022

9.5 Leading National Military Simulation and Virtual Training Market Forecasts
2012-2022

9.6 Fastest Growing Military Simulation and Virtual Training Submarkets & National
Markets 2012-2022

9.7 Military Simulation and Virtual Training Market Opportunities

10. GLOSSARY

List Of Tables

LIST OF TABLES

Table 1.1 Drivers and Restraints of the Military Simulation and Virtual Training Market

Table 3.1 Global Military Simulation and Virtual Training Market Forecast 2012-2022
(\$m, AGR %)

Table 3.2 Global Military Simulation and Virtual Training Market Forecast CAGR (%)
2012-2022, 2012-2017, and 2017-2022

Table 3.3 Military Simulation and Virtual Training Submarket Forecasts 2012-2022 (\$m,
AGR %)

Table 3.4 Leading National Military Simulation and Virtual Training Markets Forecast
2012-2022 (\$m, AGR %)

Table 3.5 Global Military Simulation and Virtual Training Market, Submarkets & Leading
National Markets Forecast CAGR (%) 2012-2022, 2012-2017, 2017-2022

Table 3.6 Fastest Growing Military Simulation and Virtual Training Submarkets Forecast
CAGR (%) 2012-2022

Table 3.7 Fastest Growing Military Simulation and Virtual Training Submarkets Forecast
CAGR (%) 2012-2017

Table 3.8 Fastest Growing Military Simulation and Virtual Training Submarkets Forecast
CAGR (%) 2017-2022

Table 3.9 Fastest Growing Leading National Military Simulation and Virtual Training
Markets Forecast CAGR (%) 2012-2022

Table 3.10 Fastest Growing Leading National Military Simulation and Virtual Training
Markets Forecast CAGR (%) 2012-2017

Table 3.11 Fastest Growing Leading National Military Simulation and Virtual Training
Markets Forecast CAGR (%) 2017-2022

Table 3.12 Military Simulation and Virtual Training Submarkets Share Forecast 2012 vs
2022 (% Share, % Change)

Table 3.13 Flight and Non-flight Military Simulation and Virtual Training Submarkets
Share Forecast 2012 vs 2022 (% Share, % Change)

Table 3.14 Military Simulation and Virtual Training Flight Submarkets Share Forecast
2012 vs 2022 (% Share, % Change)

Table 3.15 Military Simulation and Virtual Training Non-Flight Submarkets Share
Forecast 2012 vs 2022 (% Share, % Change)

Table 3.16 Leading National Military Simulation and Virtual Training Markets Share
Forecast 2012 vs 2022 (% Share, % Change)

Table 3.17 Military Simulation and Virtual Training Market, Submarkets and Leading
National Markets Cumulative Sales Forecast 2012-2022 (\$bn, %)

Table 4.1 Flight and Non-flight Military Simulation and Virtual Training Market Forecasts 2012-2022 (\$m, AGR %)

Table 4.2 Flight and Non-flight Military Simulation and Virtual Training Market Forecasts CAGR (%) 2012-2022, 2012-2017, and 2017-2022

Table 4.3 Flight Military Simulation and Virtual Training Market Forecast 2012-2022 (\$m, AGR %)

Table 4.4 Flight Military Simulation and Virtual Training Market Forecast CAGR (%) 2012-2022, 2012-2017, and 2017-2022

Table 4.5 High Performance Jet Military Simulation and Virtual Training Submarket Forecast Summary 2012, 2017 and 2022 (\$bn, Rank, % Share, CAGR %, Cumulative)

Table 4.6 High Performance Jet Military Simulation and Virtual Training Submarket Forecast 2012-2022 (\$m, AGR %)

Table 4.7 High Performance Jet Military Simulation and Virtual Training Submarket Forecast CAGR (%) 2012-2022, 2012-2017, and 2017-2022

Table 4.8 Rotary Wing Military Simulation and Virtual Training Submarket Forecast Summary 2012, 2017 and 2022 (\$bn, Rank, % Share, CAGR %, Cumulative)

Table 4.9 Rotary Wing Military Simulation and Virtual Training Submarket Forecast 2012-2022 (\$m, AGR %)

Table 4.10 Rotary Wing Military Simulation and Virtual Training Submarket Forecast CAGR (%) 2012-2022, 2012-2017, and 2017-2022

Table 4.11 Transport Aircraft Military Simulation and Virtual Training Submarket Forecast Summary 2012, 2017 and 2022 (\$bn, Rank, % Share, CAGR %, Cumulative)

Table 4.12 Transport Aircraft Military Simulation and Virtual Training Submarket Forecast 2012-2022 (\$m, AGR %)

Table 4.13 Transport Aircraft Military Simulation and Virtual Training Submarket Forecast CAGR (%) 2012-2022, 2012-2017, and 2017-2022

Table 4.14 UAV Military Simulation and Virtual Training Submarket Forecast Summary 2012, 2017 and 2022 (\$bn, Rank, % Share, CAGR %, Cumulative)

Table 4.15 UAV Military Simulation and Virtual Training Submarket Forecast 2012-2022 (\$m, AGR %)

Table 4.16 UAV Military Simulation and Virtual Training Submarket Forecast CAGR (%) 2012-2022, 2012-2017, and 2017-2022

Table 4.17 Other (Flight) Military Simulation and Virtual Training Submarket Forecast Summary 2012, 2017 and 2022 (\$bn, Rank, % Share, CAGR %, Cumulative)

Table 4.18 Other (Flight) Military Simulation and Virtual Training Submarket Forecast 2012-2022 (\$m, AGR %)

Table 4.19 Other (Flight) Military Simulation and Virtual Training Submarket Forecast CAGR (%) 2012-2022, 2012-2017, and 2017-2022

Table 4.20 Non-flight Military Simulation and Virtual Training Market Forecast

2012-2022 (\$m, AGR %)

Table 4.21 Non-flight Military Simulation and Virtual Training Market Forecast CAGR (%) 2012-2022, 2012-2017, and 2017-2022

Table 4.22 Combat Military Simulation and Virtual Training Submarket Forecast Summary 2012, 2017 and 2022 (\$bn, Rank, % Share, CAGR %, Cumulative)

Table 4.23 Combat Military Simulation and Virtual Training Submarket Forecast 2012-2022 (\$m, AGR %)

Table 4.24 Combat Military Simulation and Virtual Training Submarket Forecast CAGR (%) 2012-2022, 2012-2017, and 2017-2022

Table 4.25 Naval Military Simulation and Virtual Training Submarket Forecast Summary 2012, 2017 and 2022 (\$bn, Rank, % Share, CAGR %, Cumulative)

Table 4.26 Naval Military Simulation and Virtual Training Submarket Forecast 2012-2022 (\$m, AGR %)

Table 4.27 Naval Military Simulation and Virtual Training Submarket Forecast CAGR (%) 2012-2022, 2012-2017, and 2017-2022

Table 4.28 Vehicles Military Simulation and Virtual Training Submarket Forecast Summary 2012, 2017 and 2022 (\$bn, Rank, % Share, CAGR %, Cumulative)

Table 4.29 Vehicles Military Simulation and Virtual Training Submarket Forecast Summary 2012, 2017 and 2022 (\$bn, Rank, % Share, CAGR %, Cumulative)

Table 4.30 Vehicles Military Simulation and Virtual Training Submarket Forecast 2012-2022 (\$m, AGR %)

Table 4.31 Medical Military Simulation and Virtual Training Submarket Forecast Summary 2012, 2017 and 2022 (\$bn, Rank, % Share, CAGR %, Cumulative)

Table 4.32 Medical Military Simulation and Virtual Training Submarket Forecast 2012-2022 (\$m, AGR %)

Table 4.33 Medical Military Simulation and Virtual Training Submarket Forecast CAGR (%) 2012-2022, 2012-2017, and 2017-2022

Table 4.34 Command & Modelling Military Simulation and Virtual Training Submarket Forecast Summary 2012, 2017 and 2022 (\$bn, Rank, % Share, CAGR %, Cumulative)

Table 4.35 Command & Modelling Military Simulation and Virtual Training Submarket Forecast 2012-2022 (\$m, AGR %)

Table 4.36 Command & Modelling Military Simulation and Virtual Training Submarket Forecast CAGR (%) 2012-2022, 2012-2017, and 2017-2022

Table 4.37 Maintenance Military Simulation and Virtual Training Submarket Forecast Summary 2012, 2017 and 2022 (\$bn, Rank, % Share, CAGR %, Cumulative)

Table 4.38 Maintenance Military Simulation and Virtual Training Submarket Forecast 2012-2022 (\$m, AGR %)

Table 4.39 Maintenance Military Simulation and Virtual Training Submarket Forecast CAGR (%) 2012-2022, 2012-2017, and 2017-2022

Table 4.40 Cultural, Language & Intelligence Military Simulation and Virtual Training Submarket Forecast Summary 2012, 2017 and 2022 (\$bn, Rank, % Share, CAGR %, Cumulative)

Table 4.41 Cultural, Language & Intelligence Military Simulation and Virtual Training Submarket Forecast 2012-2022 (\$m, AGR %)

Table 4.42 Cultural, Language & Intelligence Military Simulation and Virtual Training Submarket Forecast CAGR (%) 2012-2022, 2012-2017, and 2017-2022

Table 5.1 US Military Simulation and Virtual Training Market Forecast Summary 2012, 2017 and 2022 (\$bn, Rank, % Share, CAGR %, Cumulative)

Table 5.2 US Military Simulation and Virtual Training Market Forecast 2012-2022 (\$m, AGR %)

Table 5.3 US Military Simulation and Virtual Training Market Forecast CAGR (%) 2012-2022, 2012-2017, and 2017-2022

Table 5.4 UK Military Simulation and Virtual Training Market Forecast Summary 2012, 2017 and 2022 (\$bn, Rank, % Share, CAGR %, Cumulative)

Table 5.5 UK Military Simulation and Virtual Training Market Forecast 2012-2022 (\$m, AGR %)

Table 5.6 UK Military Simulation and Virtual Training Market Forecast CAGR (%) 2012-2022, 2012-2017, and 2017-2022

Table 5.7 Chinese Military Simulation and Virtual Training Market Forecast Summary 2012, 2017 and 2022 (\$bn, Rank, % Share, CAGR %, Cumulative)

Table 5.8 Chinese Military Simulation and Virtual Training Military Simulation and Virtual Training Market Forecast 2012-2022 (\$m, AGR %)

Table 5.9 Chinese Military Simulation and Virtual Training Market Forecast CAGR (%) 2012-2022, 2012-2017, and 2017-2022

Table 5.10 French Military Simulation and Virtual Training Market Forecast Summary 2012, 2017 and 2022 (\$bn, Rank, % Share, CAGR %, Cumulative)

Table 5.11 French Military Simulation and Virtual Training Military Simulation and Virtual Training Market Forecast 2012-2022 (\$m, AGR %)

Table 5.12 French Military Simulation and Virtual Training Market Forecast CAGR (%) 2012-2022, 2012-2017, and 2017-2022

Table 5.13 German Military Simulation and Virtual Training Market Forecast Summary 2012, 2017 and 2022 (\$bn, Rank, % Share, CAGR %, Cumulative)

Table 5.14 German Military Simulation and Virtual Training Market Forecast 2012-2022 (\$m, AGR %)

Table 5.15 German Military Simulation and Virtual Training Market Forecast CAGR (%) 2012-2022, 2012-2017, and 2017-2022

Table 5.16 Canadian Military Simulation and Virtual Training Market Forecast Summary 2012, 2017 and 2022 (\$bn, Rank, % Share, CAGR %, Cumulative)

Table 5.17 Canadian Military Simulation and Virtual Training Market Forecast
2012-2022 (\$m, AGR %)

Table 5.18 Canadian Military Simulation and Virtual Training Market Forecast CAGR
(%) 2012-2022, 2012-2017, and 2017-2022

Table 5.19 Australian Military Simulation and Virtual Training Market Forecast Summary
2012, 2017 and 2022 (\$bn, Rank, % Share, CAGR %, Cumulative)

Table 5.20 Australian Military Simulation and Virtual Training Market Forecast
2012-2022 (\$m, AGR %)

Table 5.21 Australian Military Simulation and Virtual Training Market Forecast CAGR
(%) 2012-2022, 2012-2017, and 2017-2022

Table 5.22 Indian Military Simulation and Virtual Training Market Forecast Summary
2012, 2017 and 2022 (\$bn, Rank, % Share, CAGR %, Cumulative)

Table 5.23 Indian Military Simulation and Virtual Training Market Forecast 2012-2022
(\$m, AGR %)

Table 5.24 Indian Military Simulation and Virtual Training Market Forecast CAGR (%)
2012-2022, 2012-2017, and 2017-2022

Table 5.25 Italian Military Simulation and Virtual Training Market Forecast Summary
2012, 2017 and 2022 (\$bn, Rank, % Share, CAGR %, Cumulative)

Table 5.26 Italian Military Simulation and Virtual Training Market Forecast 2012-2022
(\$m, AGR %)

Table 5.27 Italian Military Simulation and Virtual Training Market Forecast CAGR (%)
2012-2022, 2012-2017, and 2017-2022

Table 5.28 Israeli Military Simulation and Virtual Training Market Forecast Summary
2012, 2017 and 2022 (\$bn, Rank, % Share, CAGR %, Cumulative)

Table 5.29 Israeli Military Simulation and Virtual Training Market Forecast 2012-2022
(\$m, AGR %)

Table 5.30 Israeli Military Simulation and Virtual Training Market Forecast CAGR (%)
2012-2022, 2012-2017, and 2017-2022

Table 5.31 Russian Military Simulation and Virtual Training Market Forecast Summary
2012, 2017 and 2022 (\$bn, Rank, % Share, CAGR %, Cumulative)

Table 5.32 Russian Military Simulation and Virtual Training Market Forecast 2012-2022
(\$m, AGR %)

Table 5.33 Russian Military Simulation and Virtual Training Market Forecast CAGR (%)
2012-2022, 2012-2017, and 2017-2022

Table 5.34 Saudi Arabian Military Simulation and Virtual Training Market Forecast
Summary 2012, 2017 and 2022 (\$bn, Rank, % Share, CAGR %, Cumulative)

Table 5.35 Saudi Arabian Military Simulation and Virtual Training Market Forecast
2012-2022 (\$m, AGR %)

Table 5.36 Saudi Arabian Military Simulation and Virtual Training Market Forecast

CAGR (%) 2012-2022, 2012-2017, and 2017-2022

Table 5.37 Netherlands Military Simulation and Virtual Training Market Forecast
Summary 2012, 2017 and 2022 (\$bn, Rank, % Share, CAGR %, Cumulative)

Table 5.38 Netherlands Military Simulation and Virtual Training Market Forecast
2012-2022 (\$m, AGR %)

Table 5.39 Netherlands Military Simulation and Virtual Training Market Forecast CAGR
(%) 2012-2022, 2012-2017, and 2017-2022

Table 5.40 Japanese Military Simulation and Virtual Training Market Forecast Summary
2012, 2017 and 2022 (\$bn, Rank, % Share, CAGR %, Cumulative)

Table 5.41 Japanese Military Simulation and Virtual Training Market Forecast
2012-2022 (\$m, AGR %)

Table 5.42 Japanese Military Simulation and Virtual Training Market Forecast CAGR
(%) 2012-2022, 2012-2017, and 2017-2022

Table 5.43 South Korean Military Simulation and Virtual Training Market Forecast
Summary 2012, 2017 and 2022 (\$bn, Rank, % Share, CAGR %, Cumulative)

Table 5.44 South Korean Military Simulation and Virtual Training Market Forecast
2012-2022 (\$m, AGR %)

Table 5.45 South Korean Military Simulation and Virtual Training Market Forecast
CAGR (%) 2012-2022, 2012-2017, and 2017-2022

Table 5.46 RoW Military Simulation and Virtual Training Market Forecast Summary
2012, 2017 and 2022 (\$bn, Rank, % Share, CAGR %, Cumulative)

Table 5.47 RoW Military Simulation and Virtual Training Market Forecast 2012-2022
(\$m, AGR %)

Table 5.48 RoW Military Simulation and Virtual Training Market Forecast CAGR (%)
2012-2022, 2012-2017, and 2017-2022

Table 6.1 SWOT Analysis of the Military Simulation and Virtual Training Market
2012-2022

Table 9.1 Fastest Growing Military Simulation and Virtual Training Submarkets and
Leading National Markets CAGR (%) 2012-2022

List Of Figures

LIST OF FIGURES

Figure 3.1 Global Military Simulation and Virtual Training Market Forecast 2012-2022 (\$m)

Figure 3.2 Global Military Simulation and Virtual Training Market Forecast AGR & CAGR 2012-2022 (%)

Figure 3.3 Military Simulation and Virtual Training Submarket Forecasts 2012-2022 (\$m)

Figure 3.4 Leading National Military Simulation and Virtual Training Market Forecasts 2012-2022 (\$m)

Figure 3.5 Fastest Growing Military Simulation and Virtual Training Submarkets Forecast CAGR (%) 2012-2022

Figure 3.6 Fastest Growing Military Simulation and Virtual Training Submarkets Forecast CAGR (%) 2012-2017

Figure 3.7 Fastest Growing Military Simulation and Virtual Training Submarkets Forecast CAGR (%) 2017-2022

Figure 3.8 Fastest Growing Leading National Military Simulation and Virtual Training Markets Forecast CAGR (%) 2012-2022

Figure 3.9 Fastest Growing Leading National Military Simulation and Virtual Training Markets Forecast CAGR (%) 2012-2017

Figure 3.10 Fastest Growing Leading National Military Simulation and Virtual Training Markets Forecast CAGR (%) 2017-2022

Figure 3.11 Military Simulation and Virtual Training Submarkets Share 2012 (%)

Figure 3.12 Military Simulation and Virtual Training Submarkets Share 2022 (%)

Figure 3.13 Increasing and Decreasing Military Simulation and Virtual Training Submarkets Share Forecast 2012 vs 2022 (%)

Figure 3.14 Flight and Non-flight Military Simulation and Virtual Training Submarkets Share Forecast 2012 vs 2022 (% Share)

Figure 3.15 Military Simulation and Virtual Training Flight Submarkets Share 2012 (%)

Figure 3.16 Military Simulation and Virtual Training Flight Submarkets Share 2022 (%)

Figure 3.17 Increasing and Decreasing Military Simulation and Virtual Training Submarkets Share Forecast 2012 vs 2022 (%)

Figure 3.18 Military Simulation and Virtual Training Non-Flight Submarkets Share 2012 (%)

Figure 3.19 Military Simulation and Virtual Training Non-Flight Submarkets Share 2022 (%)

Figure 3.20 Increasing and Decreasing Military Simulation and Virtual Training Non-

Flight Submarkets Share Forecast 2012 vs 2022 (%)

Figure 3.21 Leading National Military Simulation and Virtual Training Markets Share 2012 (%)

Figure 3.22 Leading National Military Simulation and Virtual Training Markets Share 2022 (%)

Figure 3.23 Increasing and Decreasing Military Simulation and Virtual Training Leading National Markets Share Forecast 2012 vs 2022 (%)

Figure 3.24 Military Simulation and Virtual Training Flight and Non-Flight Cumulative Sales Forecast 2012-2022 (\$bn, % Share)

Figure 3.25 Military Simulation and Virtual Training Submarkets Cumulative Sales 2012-2022 (\$bn)

Figure 3.26 Military Simulation and Virtual Training Submarkets Cumulative Sales Percentage Share 2012-2022 (\$bn, % Share)

Figure 3.27 Leading National Military Simulation and Virtual Training Markets Cumulative Sales 2012-2022 (\$bn)

Figure 3.28 Leading National Military Simulation and Virtual Training Markets Cumulative Sales Percentage Share 2012-2022 (%)

Figure 4.1 Flight and Non-flight Military Simulation and Virtual Training Market Forecasts 2012-2022 (\$m)

Figure 4.2 Flight and Non-flight Military Simulation and Virtual Training Market Forecasts Annual Growth Rate (AGR %) 2012-2022

Figure 4.3 Flight Military Simulation and Virtual Training Market Forecast 2012-2022 (\$m)

Figure 4.4 Flight Military Simulation and Virtual Training Market Forecast Annual Growth Rate (%) 2012-2022

Figure 4.5 High Performance Jet Military Simulation and Virtual Training Submarket Share Forecast 2012, 2017 and 2022 (% Share)

Figure 4.6 High Performance Jet Military Simulation and Virtual Training Submarket Forecast 2012-2022 (\$m)

Figure 4.7 Rotary Wing Military Simulation and Virtual Training Submarket Share Forecast 2012, 2017 and 2022 (% Share)

Figure 4.8 Rotary Wing Military Simulation and Virtual Training Submarket Forecast 2012-2022 (\$m)

Figure 4.9 Transport Aircraft Military Simulation and Virtual Training Submarket Share Forecast 2012, 2017 and 2022 (% Share)

Figure 4.10 Transport Aircraft Military Simulation and Virtual Training Submarket Forecast 2012-2022 (\$m)

Figure 4.11 UAV Military Simulation and Virtual Training Submarket Share Forecast 2012, 2017 and 2022 (% Share)

Figure 4.12 UAV Military Simulation and Virtual Training Submarket Forecast
2012-2022 (\$m)

Figure 4.13 Other (Flight) Military Simulation and Virtual Training Submarket Share
Forecast 2012, 2017 and 2022 (% Share)

Figure 4.14 Other (Flight) Military Simulation and Virtual Training Submarket Forecast
2012-2022 (\$m)

Figure 4.15 Non-flight Military Simulation and Virtual Training Market Forecast
2012-2022 (\$m)

Figure 4.16 Non-flight Military Simulation and Virtual Training Market Forecast Annual
Growth Rate (AGR %) 2012-2022

Figure 4.17 Combat Military Simulation and Virtual Training Submarket Share Forecast
2012, 2017 and 2022 (% Share)

Figure 4.18 Combat Military Simulation and Virtual Training Submarket Forecast
2012-2022 (\$m)

Figure 4.19 Naval Military Simulation and Virtual Training Submarket Share Forecast
2012, 2017 and 2022 (% Share)

Figure 4.20 Naval Military Simulation and Virtual Training Submarket Forecast
2012-2022 (\$m)

Figure 4.21 Vehicles Military Simulation and Virtual Training Submarket Share Forecast
2012, 2017 and 2022 (% Share)

Figure 4.22 Vehicles Military Simulation and Virtual Training Submarket Forecast
2012-2022 (\$m)

Figure 4.23 Medical Military Simulation and Virtual Training Submarket Share Forecast
2012, 2017 and 2022 (% Share)

Figure 4.24 Medical Military Simulation and Virtual Training Submarket Forecast
2012-2022 (\$m)

Figure 4.25 Command & Modelling Military Simulation and Virtual Training Submarket
Share Forecast 2012, 2017 and 2022 (% Share)

Figure 4.26 Command & Modelling Military Simulation and Virtual Training Submarket
Forecast 2012-2022 (\$m)

Figure 4.27 Maintenance Military Simulation and Virtual Training Submarket Share
Forecast 2012, 2017 and 2022 (% Share)

Figure 4.28 Maintenance Military Simulation and Virtual Training Submarket Forecast
2012-2022 (\$m)

Figure 4.29 Cultural, Language & Intelligence Military Simulation and Virtual Training
Submarket Share Forecast 2012, 2017 and 2022 (% Share)

Figure 4.30 Cultural, Language & Intelligence Military Simulation and Virtual Training
Submarket Forecast 2012-2022 (\$m)

Figure 5.1 US Military Simulation and Virtual Training Market Share Forecast 2012,

2017 and 2022 (% Share)

Figure 5.2 US Military Simulation and Virtual Training Market Forecast 2012-2022 (\$m)

Figure 5.3 UK Military Simulation and Virtual Training Market Share Forecast 2012, 2017 and 2022 (% Share)

Figure 5.4 UK Military Simulation and Virtual Training Market Forecast 2012-2022 (\$m)

Figure 5.5 Chinese Military Simulation and Virtual Training Market Share Forecast 2012, 2017 and 2022 (% Share)

Figure 5.6 Chinese Military Simulation and Virtual Training Market Forecast 2012-2022 (\$m)

Figure 5.7 French Military Simulation and Virtual Training Market Share Forecast 2012, 2017 and 2022 (% Share)

Figure 5.8 French Military Simulation and Virtual Training Market Forecast 2012-2022 (\$m)

Figure 5.9 German Military Simulation and Virtual Training Market Share Forecast 2012, 2017 and 2022 (% Share)

Figure 5.10 German Military Simulation and Virtual Training Market Forecast 2012-2022 (\$m)

Figure 5.11 Canadian Military Simulation and Virtual Training Market Share Forecast 2012, 2017 and 2022 (% Share)

Figure 5.12 Canadian Military Simulation and Virtual Training Market Forecast 2012-2022 (\$m)

Figure 5.13 Australian Military Simulation and Virtual Training Market Share Forecast 2012, 2017 and 2022 (% Share)

Figure 5.14 Australian Military Simulation and Virtual Training Market Forecast 2012-2022 (\$m)

Figure 5.15 Indian Military Simulation and Virtual Training Market Share Forecast 2012, 2017 and 2022 (% Share)

Figure 5.16 Indian Military Simulation and Virtual Training Market Forecast 2012-2022 (\$m)

Figure 5.17 Italian Military Simulation and Virtual Training Market Share Forecast 2012, 2017 and 2022 (% Share)

Figure 5.18 Italian Military Simulation and Virtual Training Market Forecast 2012-2022 (\$m)

Figure 5.19 Israeli Military Simulation and Virtual Training Market Share Forecast 2012, 2017 and 2022 (% Share)

Figure 5.20 Israeli Military Simulation and Virtual Training Market Forecast 2012-2022 (\$m)

Figure 5.21 Russian Military Simulation and Virtual Training Market Share Forecast 2012, 2017 and 2022 (% Share)

Figure 5.22 Russian Military Simulation and Virtual Training Market Forecast 2012-2022 (\$m)

Figure 5.23 Saudi Arabian Military Simulation and Virtual Training Market Share Forecast 2012, 2017 and 2022 (% Share)

Figure 5.24 Saudi Arabian Military Simulation and Virtual Training Market Forecast 2012-2022 (\$m)

Figure 5.25 Netherlands Military Simulation and Virtual Training Market Share Forecast 2012, 2017 and 2022 (% Share)

Figure 5.26 Netherlands Military Simulation and Virtual Training Market Forecast 2012-2022 (\$m)

Figure 5.27 Japanese Military Simulation and Virtual Training Market Share Forecast 2012, 2017 and 2022 (% Share)

Figure 5.28 Japanese Military Simulation and Virtual Training Market Forecast 2012-2022 (\$m)

Figure 5.29 South Korean Military Simulation and Virtual Training Market Share Forecast 2012, 2017 and 2022 (% Share)

Figure 5.30 South Korean Military Simulation and Virtual Training Market Forecast 2012-2022 (\$m)

Figure 5.31 RoW Military Simulation and Virtual Training Market Share Forecast 2012, 2017 and 2022 (% Share)

Figure 5.32 RoW Military Simulation and Virtual Training Market Forecast 2012-2022 (\$m)

COMPANIES LISTED

AAI Corporation

AAI Test & Training

Accenture National Security Services, LLC

Adacel

Advanced Simulation Research

AEgis Technologies Group

Aero Simulation, Inc.

Ahtna Support & Training Services, LLC

Airbus Military

Alelo, Inc.

Alelo TLT, LLC

Alenia Aeronautica

Alenia Aeromacchi

Alion Science & Technology

Allied Container Systems, Inc.
Allied Technology Group, Inc.
American Systems Corporation
Antycip Simulation
Applied Research Associates
Argon ST
AT&T Government Solutions, Inc.
Atlantis Systems America, Inc.
AgustaWestland
Ascent Flight Training
Australian Unmanned Systems Academy
AVT Simulation
BAE Systems Land & Armaments, Inc.
Barco
Battelle
BBN Technologies Corporation
Bearing Point, Inc.
Beijing TT Aviation Technology
Binghamton Simulator Company
Boeing Corporation
Boeing Defense, Space and Security
Boeing Training Systems & Services (TSGS)
Bohemia Interactive Solutions
Booz Allen Hamilton, Inc.
Brightspot Interactive Learning
Britannica Fox
CACI
Camber Corporation
CAE GmbH
CAE Healthcare
CAE Inc
CAE India
CAE Singapore
CAE UK Plc
CAE USA
Calytrix Technologies
Carley Corporation
Caspian Learning
Cassidian

CG2, Inc.
CH Products
Christy Aerospace & Technology
Ciber, Inc.
Cobham Air Services
Cole Engineering Services, Inc.
COLSA Corporation
Computer Sciences Corporation
Concurrent Technologies Corporation
Crytek
Cubic Corporation
Cubic Defense Applications (CDA)
Cubic Simulation Systems, Inc.
CuSim
CyberNet Systems Corporation
CymSTAR LLC
D&S Consultants, Inc.
Daedalus Technologies, Inc.
DCS Corporation
DEI Services Corporation
DHL
DI-Guy
Diginext
Digital Fusion Solutions, Inc.
DME Corporation
DRS C3 Systems, Inc.
DTM Global
Dynamic Animation Systems
Dynamics Research Corporation
Dynetics, Inc.
EADS
EADS Airbus
EADS Astrium
EADS Cassidian
EADS Eurocopter
EADS North America
EDM Defence and Training
EDM Ltd
EG&G Technical Services, Inc.

Elbit Systems Ltd
Electronic Defence Systems (EDS)
Engineering & Computer Simulations, Inc.
Environmental Tectonics Corporation
Equipe Simulation
eSim Games
Eurocopter
FAAC, Inc.
FB Heliservices
Fedex
Fidelity Flight Simulation, Inc.
Fidelity Technologies Corporation
Flight Safety International Inc.
Flight Safety Services Corporation
Forterra Federal Systems
FSCX, Inc.
Future Design & Engineering Corporation
Gavap
GBL Systems Corporation
General Atomics Aeronautical Systems Inc
General Dynamics Corporation
General Dynamics Information Technology (GDIT)
General Dynamics One Source, LLC
Georgia Tech Applied Research Corporation
Giant Network Technology Company
H-Sim
Harris Corporation - Government Communications System Division
Havelsan
Hawker Beechcraft
Hindustan Aeronautics Limited (HAL)
IAI
IBM Corporation
ICF Incorporated, LLC
IFAD
Imedia.IT, Inc.
Indra
ING Engineering Inc.
INOVA Health Systems
Intelligence Gaming/InVisM

Intelligent Decisions
InterCoastal Electronics, Inc.
InterSense
ITS Technologies
ITT Corporation, Advanced Engineering & Sciences Division
IVIR Inc.
Janus Research Group
JHT, Inc.
JSCo Oboronservis
Kadix Systems, LLC.
Kaiser Electronics
KBR
Kongsberg Gruppen
KMW Training & Simulation
L-3 Communications Corporation
L-3 Communications Link
L-3 Link Simulation & Training
LaserShot
LB&B Associates
Lockheed Martin Aeronautics
Lockheed Martin Corporation
Lockheed Martin Global Training and Logistics
Lockheed Martin Simulation, Training & Support (LMSTS)
Logistics Services International, Inc.
Loyola Enterprises, Inc.
MAK Technologies, Inc.
ManTech (SRS Technologies)
MASA Group
Meggitt PLC Equipment Group
Meggitt Training Systems
MetaVR
Metrix Consortium
Metters Industries, Inc.
Military Mouflage Combat Injury Simulation
Mitsubishi Aircraft Corporation
MLB Company
MTS Technologies, Inc.
MYMIC, LLC
Newman & Spurr Consultancy

NGRAIN
NH Industries
Northrop Grumman Technical Services, Inc.
Northrop Grumman
Nova Technologies
Novonics Corporation
Opal-RT Technologies
Opinicus
Optis Group
Outstart
Pal Technologies, Inc.
Parsons Infrastructure & Technology Group, Inc.
Pilatus Aircraft Ltd
Planning Systems, Inc.
Presagis
Prescient Systems & Technologies
Professional Way
Pulse Aerospace
Pulse Learning
QinetiQ
QuantaDyn Corporation.
Quantum3D
Rafael Advanced Defence Systems
Rahaden Trading
Ramora UK
Raydon Corporation
Raytheon Company
Raytheon Technical Services (TS)
Real Time Immersive
Rheinmetall Defence
Rheinmetall Defence Electronics
Rheinmetall Group
Robonic Ltd Oy
Rockwell Collins Inc.
Rockwell Collins Simulation & Training Solutions, LLC
Rotorsim
RTDynamics
RTI International
Saab Group

Saab Training Systems
Saab Training USA
Saab AB
Saba
SAFRAN Group
SAGEM
SAGEM Euroflir
SCA Qualis
Science Applications & Research Associates, Inc.
Science Applications International Corporation (SAIC)
Scientific Research Corporation (SRC)
SDS International Inc.
SDS International Advanced Technologies Division
Setex Galileo
SI International, Inc.
Sierra Nevada Corporation
Sikorsky Aircraft Corporation
Silicon Valley Simulation
SimplySim
ST Engineering
Sogitec Industries
Sondexo
Southwest Research Institute (SwRI)
Sparta, Inc.
Sperry Marine
ST Electronics
ST Electronics Digital Media
STS International, Inc.
Sukhoi Company
Symvionics, Inc.
SYS Technologies
System Studies and Simulation, Inc.
Systematic
Systems Research & Applications Corporation
Sytronics, Inc.
Tactical Communications Group
Tapestry Solutions, Inc.
Tata Group
TecMasters Inc. (TMI)

Teledyne Brown Engineering, Inc.
Textron Systems
Thales Australia
Thales Communications Inc.
Thales Group
Thales Land & Joint Systems
Thales Training & Simulation
Thales UK
The Aegis Technologies Group, Inc.
Thomas Defense Group
TJ Drafting & Design, Inc.
Total Immersion Software, Inc.
Transas Group
Tybrin Corporation
United Industrial Corporation
Universal Systems & Technology, Inc. (UNITECH)
UPS
UTEC Flight Training
Vertex Solutions, Inc.
Viking Aerospace, LLC
Visual Awareness Technologies & Consulting, Inc.
VT Group
VT Mak
V-TOL Aerospace
Wipro
Wittenstein
Wuxi Giant Interactive Group
Zel Technologies, Inc.
Zen Technologies

GOVERNMENT AGENCIES AND OTHER ORGANISATIONS MENTIONED IN THIS REPORT

Aeronautical System Centre
Arabian Ministry of Defence (SAMOD)
Army High Performance Computing Research Centre (AHPCRC)
Atsugi Naval Air Facility
Australian Defence Force (ADF)
Australian Defence Materiel Organisation (DMO)

Australian Defence Support Group (DSG)
Australian Navy (AN)
Australian UAV Training Academy
Azerbaijani Defence Ministry
Azerbaijani Land Forces
Belgian Army
Brazilian Air Force
British Army
British Army Training Unit Suffield (BATUS)
British Royal Navy Maritime Warfare School
Brunei International Airport
Brunei Ministry of Defence (BMOD)
Bundeswehr
Canadian Air Force (CAF)
Canadian Department of National Defence
Canadian Forces (CF)
Canadian Forces School of Engineering (CFSEME)
Central Intelligence Agency (CIA)
Centre for Integration of Medicine and Innovative Technology (CIMIT)
Civil Aviation Authority (CAA)
College of Technology & Aviation
Cranfield University Simulation & Synthetic Environment Laboratory (SSEL)
Crew Vehicle Systems Research Facility (CVSRF)
Defence Capability Centre (DCC)
Defence Training Estate, Salisbury Plain (DTE, SP)
Department of Veterans Affairs (VA)
European Aviation Safety Agency (EASA)
Fassberg Military Base
Federal Aviation Authority (FAA)
Federal Bureau of Investigation (FBI)
French Army
Futenma Air Station, Japan
Georgian Army
German Army Aviation School
German Federal Office of Defence Technology Procurement
Grand Forks Air Force Base, North Dakota
GUZ Combat Training Centre, Germany
Helicopter Academy to Train by Simulation of Flying (HATSOFF)
Indian Air Force (IAF)

Indian Army (IA)
Indian Directorate General Civil Aviation (DGCA)
Indian Institute of Aerospace Medicine
Indian Ministry of Defence (IMOD)
Israeli Air Force (IAF)
Israeli Defence Force (IDF)
Italian Navy
Jackson State University
Japanese Self-Defense Force (JSDF)
Jordanian Armed Forces
Kane'ohe Marine Corps Air Station, Hawaii
Kansas State University (KSU)
King Abdullah Special Operations Training Centre (KASOTC)
Kuwait Air Force (KAF)
Macedonian (FYROM) Defence and Security Forces
Maryport Naval Station, Florida
MCALF Bogue Field, North Carolina
MCAS Iwakumi
Ministry of Defence for the Netherlands (MINDEF NL)
Ministry of Defence of the Russian Federation (RMOD)
Ministry of Finance of Brunei (MOFB)
Modelling Simulation & Analysis Division and the Simulation and Analysis Facility
Mountain Home Air Force Base, USA
National Aerospace Laboratory (NAL)
Nayla Air Station, Florida
Netherlands Defence Agency
Norma Brown Airbase
North Atlantic Treaty Organisation (NATO)
Norwegian Armed Forces
National Security Agency (NSA)
Organisation for Joint Armament Cooperation (OCCAR)
Pakistan Army
Palmachim Air Force Base
People's Liberation Army Air Force (PLAAF)
People's Liberation Army of China (PLA)
PLA 2nd Artillery Command Academy
PLA Army Aviation Academy
PLA Navy
PLA Navy Central Military Commission

PLA Navy Party Committee
Quantico Base, Virginia
RAF Brize Norton
Republic of Korea Air Force
Republic of Korea Army
Requirements and Capabilities Integration Directorate
RNAS Culdrose
Romanian Air Force
Royal Australian Air Force (RAAF)
Royal Australian Air Force School of Air Traffic Control at East Sale
Royal Australian Navy
Royal Brunei Armed Forces
Royal Brunei Armed Forces National Modelling and Simulation Centre (NMSC)
Royal Danish Air Force
Royal Danish Army
Royal Danish Army Fire Support School
Royal Danish Navy
Royal Danish Navy Tactical Warfare Training Base
Royal Moroccan Air Force (RMAF)
Royal Netherlands Air Force (RNLAf)
Royal Netherlands Air Force Air Mobility Training Centre
Royal Saudi Air Force (RSAF)
Royal Saudi Navy
Royal Saudi Navy Technical Institute for Naval Studies (TINS)
Royal Thai Air Force
Russian Ministry of Defence (RMOD)
Saudi Arabian Ministry of Defence (SAMoD)
Saudi Arabian National Guard (SANG)
Saudi Arabian War College (SWC)
School of Air Traffic Control (SATC)
Sheppard Air Force Base
Spanish Army
Suborg International Airport, Malaysia
Sultan Abdul Aziz Shah Airport, Kuala Lumpur
Taiwan Ministry of National Defence (MND)
Team Orlando
Telemedicine & Advanced Technology Research Centre (TATRC)
Todendorf Military Base
Training and Doctrine Command Intelligence Support Activity

Turkish Air Force (TAF)
Turkish Naval Air Training Centre (NATC)
Turkish Navy
Turkmen Army
UK Cabinet Office
UK Defence Technical College (DTC)
UK Joint Services Command & Staff College (UK JSCSC)
UK Land Warfare Centre
UK Ministry of Defence (MoD)
UK Royal Air Force (RAF)
UK Royal Navy (RN)
United States Marine Corps (USMC)
University of Minnesota
University of North Dakota (UND)
University of Queensland
US Air Force (USAF)
US Air Force Academy
US Air Force Agency for Modeling and Simulation (US AFAMS)
US Air Force Materiel Command (AFMC)
US Army
US Army Corps of Engineers (Europe District)
US Army Engineering School
US Army Forces Command (FORSCOM)
US Army Fort Belvoir DeWitt Hospital
US Army medical Research and Materiel Command
US Army Program Executive Office for Simulation, Training and Instrumentation (PEO-STRI)
US Army RDECOM Simulation Training Technology Centre (STTC)
US College of Surgeons
US Army Research, Development and Engineering Command (RDECOM)
US Army Tank Automotive Armaments Command (TALOM)
US Army Training and Doctrine Command Intelligence Support Activity Unit
US Coast Guard
US Defence Logistics Agency (DLA)
US Defense Advanced Research Projects Agency (DARPA)
US Department of Defense (DOD)
US Department of Homeland Security
US Department of State
US Department of the Army Mission and Installation Contracting Command Centre

US Department of Veterans Affairs (VA)
US Eastern Army National Guard Aviation Training Site (EANGTS)
US I Corps Battle Command Training Centre
US Joint Chiefs of Staff (JCS)
US Joint Forces Battle Command
US Maneuver Centre of Excellence Battle Laboratory
US Marine Air-Ground Task Force (MAGTF)
US Marine Corps Chemical and Biological Incidence Response Force
US Marine Corps Systems Command Program Manager for Training Systems (PM TRASYS)
US Marine Corps Tactics and Operations Group (MCTOG)
US Marines 1st Medical Battalion
US Marshalls
US Military Training Mission (US MTM)
US National Flight Academy (NFA)
US National Naval Medical Centre/Bethesda Naval Hospital
US Naval Surface Warfare Centre (NSWC)
US Navy (USN)
US Navy Modeling and Simulation Management Office (NAVMSMO)
US Special Operations Command (US SOCOM)
US Surface Warfare Glider School
Uzbek Air Force
Wildcat Training Centre, RNAS Yeovilton
Woendrech Airbase
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