The Military Ground Reconnaissance, Surveillance, Target Acquisition (RSTA) Systems Market 2011-2021

Table 3.16 Laser Rangefinders Submarket Forecast, 2011-2021 ($m, % AGR)

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</thead>
<tbody>
<tr>
<td>Sales ($m)</td>
<td>400</td>
<td>400</td>
<td>376</td>
<td>357</td>
<td>357</td>
<td>368</td>
<td>383</td>
<td>409</td>
<td>434</td>
<td>447</td>
<td>478</td>
<td>507</td>
</tr>
<tr>
<td>% AGR</td>
<td>0</td>
<td>-6</td>
<td>-5</td>
<td>0</td>
<td>3</td>
<td>4</td>
<td>7</td>
<td>6</td>
<td>3</td>
<td>7</td>
<td>6</td>
<td></td>
</tr>
</tbody>
</table>

Source: Visiongain 2011

Table 3.17 Laser Rangefinders Submarket Forecast CAGR (%), 2011-2021, 2011-2016 & 2016-2021

<table>
<thead>
<tr>
<th></th>
<th>2011-2021</th>
<th>2011-2016</th>
<th>2016-2021</th>
</tr>
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<tbody>
<tr>
<td>CAGR (%)</td>
<td>2.4</td>
<td>-0.9</td>
<td>5.8</td>
</tr>
</tbody>
</table>

Source: Visiongain 2011

Figure 3.12 Laser Rangefinders Submarket Forecast, 2011-2021 ($m)

Source: Visiongain 2011
The Military Ground Reconnaissance, Surveillance, Target Acquisition (RSTA) Systems Market 2011-2021

Table 4.27 South Korean RSTA Systems Market Forecast, 2011-2021 ($m, % AGR)

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</tr>
</thead>
<tbody>
<tr>
<td>Sales ($m)</td>
<td>80</td>
<td>86</td>
<td>96</td>
<td>103</td>
<td>106</td>
<td>108</td>
<td>102</td>
<td>98</td>
<td>100</td>
<td>103</td>
<td>104</td>
<td>109</td>
</tr>
<tr>
<td>% AGR</td>
<td>8</td>
<td>11</td>
<td>7</td>
<td>3</td>
<td>2</td>
<td>-5</td>
<td>-4</td>
<td>2</td>
<td>3</td>
<td>1</td>
<td>4</td>
<td></td>
</tr>
</tbody>
</table>

Source: Visiongain 2011

Table 4.28 South Korean RSTA Systems Market Forecast CAGR (%), 2011-2021, 2011-2016 & 2016-2021

<table>
<thead>
<tr>
<th>Period</th>
<th>2011-2021</th>
<th>2011-2016</th>
<th>2016-2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAGR (%)</td>
<td>2.3</td>
<td>3.5</td>
<td>1.2</td>
</tr>
</tbody>
</table>

Source: Visiongain 2011

Figure 4.19 South Korean RSTA Systems Market Forecast, 2011-2021 ($m)

Source: Visiongain 2011
6. Expert Opinion

Visiongain sought opinions from leading figures that are active in the global reconnaissance, surveillance and target acquisition (RSTA) systems marketplace to underpin the analysis of market drivers and restraints presented in this report, as well as to inform market valuation and sales forecasting. Two transcripts of interviews with industry experts representing leading RSTA systems companies are presented in this chapter.

6.1 Saab AB: Anna Bergenlid, Head of Communication, Electronic Defence Systems

Saab AB offers products and services to defence and security customers around the world. The company’s key markets are Australia, Europe, South Africa and the US. Saab employs 12,536 people and has its headquarters in Stockholm, Sweden. The company focuses on five main business areas: aeronautics; dynamics; electronic defence systems; security and defence solutions; and support and services.

Visiongain’s questions were answered by Anna Bergenlid in September 2011. We thank her for her contribution.

6.1.1 Leading Player in RSTA

Visiongain: Could you please begin by telling me what role you see Saab playing in the global RSTA systems market in terms of your position relative to your competitors?

Anna Bergenlid: Saab is one of the world’s premier suppliers of leading-edge solutions for surveillance, threat detection and location.

6.1.2 Supplying Weapon-Locating Radar Systems

Visiongain: Who are your customers for weapon-locating radar systems and why do you think they choose your products?

Anna Bergenlid: Saab’s weapon-locating system ARTHUR is widely used by demanding customers around the world. Examples of customers are the Czech Republic, Denmark, Greece, Norway, Spain,
7. Leading RSTA Systems Companies

This chapter contains background information and contract data for a representative selection of leading companies operating in the global reconnaissance, surveillance and target acquisition (RSTA) systems market.

Given the complexity of the marketplace and space constraints inherent in any such market report, the following should not be considered an exhaustive survey of the marketplace. Visiongain acknowledges the potential for oversights in drawing up such a list.

7.1 BAE Systems Plc

BAE Systems Plc is a global defence and security company offering a wide range of products and services for air, land and naval forces. BAE Systems employs about 100,000 people around the world.

In April 2011, BAE Systems announced that it had been awarded a $56m contract for thermal weapon sights (TWS) from the US Army Research, Development and Engineering Command (RDECOM). The company was tasked with supplying light, medium and heavy TWS configurations for use on individual and crew-served weapons. In August 2011, BAE Systems stated that it had delivered 100,000 TWS to US Army personnel operating in Iraq and Afghanistan.

In September 2010, BAE Systems announced that it had received a $123m order from the US Army under a five-year indefinite delivery, indefinite quantity (IDIQ) contract for TWS. In May 2009, BAE Systems stated that it had clinched a $137m TWS order from the US Army RDECOM. In October 2008, BAE Systems announced that the US Army RDECOM had awarded the company a $66m contract for TWS. In March 2008, the company announced the award of a $130m TWS contract from the US Army Program Executive Office (PEO) Soldier.

In December 2010, BAE Systems announced that it had clinched contracts worth a combined $38m to supply thermal-imaging sights for the US Army’s Common Remotely Operated Weapon Station II (CROWS II) and Stryker wheeled armoured vehicles programmes. BAE Systems was tasked with providing Thermal Imaging Module (TIM) 1500 thermal imagers for use with remote weapon stations (RWS) to Kongsberg Defence Systems (KDS).