

# ARCHIVED REPORT

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## Submachine Guns (Europe)

### Outlook

- European players remain the world leaders in the development, manufacture, and export of submachine guns
- The requirements of special operations forces continue to drive submachine gun popularity and procurement worldwide
- Production of submachine guns from all European sources will average at least 10,000 weapons annually

### Orientation

**Description.** Light, selective-fire, or full-automatic weapons firing pistol-caliber ammunition.

**Sponsor.** European contractors (some of which are government-owned arsenals) develop, produce, and market various submachine gun designs.

**Licensees.** Several international contractors produce European submachine gun designs, with or without license.

**Status.** Development through serial production.

**Total Produced.** Through 2023, we estimate that European contractors produced at least 2.58 million submachine guns since 1980 inclusive.

**Application.** A selective-fire or full-automatic personal weapon that fires pistol-caliber ammunition. The submachine gun is optimized for individual defense at short range as well as for specialized, limited offensive use.

**Price Range.** In 2024 U.S. dollars, European submachine guns carry unit prices ranging anywhere up to \$2,719 (for some versions of the Heckler & Koch MP5SD).

In addition, many European submachine guns appear on the international market in as-new condition at very competitive prices.

### Contractors

#### Prime

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<b>Ceska Zbrojovka AS</b>	<a href="http://www.czub.cz">http://www.czub.cz</a> , Svatopluka Cecha 1283, Uhersky Brod, Czech Republic, Tel: + 420 572 65 11 11, Fax: + 420 572 63 36 65, Email: <a href="mailto:info@czub.cz">info@czub.cz</a> , Prime
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## Submachine Guns (Europe)

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## Technical Data

<u>Caliber</u>	<u>Designation</u>	<u>Type (Action/Fire Modes)</u>
<u>Manufacturer - BAE Systems plc</u>		
9x19mm Parabellum	L2A3	Blowback, selective
9x19mm Parabellum	L34A1	Blowback, selective
9x19mm Parabellum	Mk 7A4/8	Blowback, selective
<u>Manufacturer - Central Scientific Research Institute of Precise Mechanical Engineering (Rosoboronexport)</u>		
9x18mm (57-N-181SM)	Baksan	Blowback, automatic
9x19mm Parabellum	Baksan	Blowback, automatic
9x21mm Gyrza	SR-2	Gas, selective
<u>Manufacturer - Ceska Zbrojovka AS</u>		
7.65x17mm SR	Model 61 Skorpion	Blowback, selective
7.65x17mm SR	VZ61/96 SD	Blowback, selective
7.65x17mm SR	CZ-91S	Blowback, selective
9x17mm Short	Model 83 Skorpion	Blowback, selective
9x17mm Short	CZ-91S	Blowback, selective
9x18mm Makarov	Model 64 Skorpion	Blowback, selective
9x18mm Makarov	Model 82 Skorpion	Blowback, selective
9x18mm Makarov	CZ-91S	Blowback, selective
<u>Manufacturer - Fabbrica D'Armi Pietro Beretta SpA</u>		
9x19mm Parabellum	Model 12S	Blowback, selective
9x19mm Parabellum	Model PM12S2	Blowback, selective
<u>Manufacturer - Fabryka Broni "Lucznik" – Radom Sp.z.o.o</u>		
9x19mm Parabellum	PM-84P Glauberyt	Blowback, selective
9x19mm Parabellum	PM-98	Blowback, selective
9x19mm Parabellum	PM-98S	Blowback, selective
9x18mm Makarov	PM-84 Glauberyt	Blowback, selective
<u>Manufacturer - FN Herstal SA</u>		
5.7x28mm	P90	Blowback, selective
9x19mm Parabellum	Model 12 S	Blowback, selective
9x19mm Parabellum	Uzi	Blowback, selective
<u>Manufacturer - Heckler &amp; Koch GmbH</u>		
4.6x30mm	Personal Defense Weapon	Gas, selective fire
9x19mm Parabellum	MP5 series	Delayed blowback, selective
10.11x21.6mm (.40 Smith & Wesson)	MP5/40	Delayed blowback, selective
10.13x25mm (10mm Bren Ten)	MP5/10	Delayed blowback, selective

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<u>Caliber</u>	<u>Designation</u>	<u>Type (Action/Fire Modes)</u>
<u>Manufacturer - IZHMAASH/Kalashnikov (Rosoboronexport)</u>		
9x19mm Parabellum	Bizon-2-01	Blowback, selective
9x17.27mm (9mm Short)	Bizon-2-02	Blowback, selective
9x18mm Makarov	Bizon-2	Blowback, selective
9x18mm Makarov	Bizon-2-03	Blowback, selective
<u>Manufacturer - KBP Instrument Design Bureau (Rosoboronexport)</u>		
9x18mm Makarov	OTs-22	Blowback, selective
9x18mm Makarov	PP-90	Blowback, automatic
9x19mm Parabellum	PP-90M	Blowback, automatic
9x19mm Parabellum	PP-90M1	Blowback, selective
9x18mm Makarov	PP-93	Blowback, selective
9x18mm Makarov	9A-91	Gas, selective
<u>Manufacturer - Kovrov Mechanical Plant (Rosoboronexport)</u>		
9x18mm Makarov	AeK-919	Blowback, selective
9x18mm Makarov	AyeK-919	Blowback, selective
<u>Manufacturer - Parker-Hale (John Rothery Wholesale Co Ltd)</u>		
9x19mm Parabellum	Individual Defense Weapon	Blowback, automatic
<u>Manufacturer - Rex Firearms Company (Rosoboronexport)</u>		
9x19mm Parabellum	Gepard	Blowback, selective
9x21mm Russian	Gepard	Blowback, selective
9x30mm Grom	Gepard	Gas, selective
9x17mm Short	Gepard	Delayed blowback, selective
9x18mm Makarov	Gepard	Blowback, selective
<u>Manufacturer - Steyr Mannlicher GmbH &amp; Co KG</u>		
9x19mm Parabellum	AUG Para	Blowback, selective
9x19mm Parabellum	MPi69	Blowback, selective
9x19mm Parabellum	MPi81	Blowback, selective
9x19mm Parabellum	MPi81 Firing Port Model	Blowback, selective
9x19mm Parabellum	TMP	Delayed blowback, selective

## Variants/Upgrades

**Variants.** Not generally applicable. To have the greatest degree of product differentiation and largest range of products, small arms manufacturers usually give different designations to modified or upgraded models of their weapons.

**Modernization and Retrofit Overview.** Not generally applicable. Contractors usually integrate upgrades as production cut-ins.

## Program Review

**Background.** Submachine guns are light, short-range, fully automatic or selective-fire shoulder weapons, traditionally distinguished by their high rates of fire and use of pistol-caliber ammunition. Submachine guns can provide a level of self-defense to personnel (armored vehicle crews, military police, combat support troops, staff members) for whom carrying a full-size battle rifle or carbine would be inappropriate. The modern submachine gun, however, comes into its own in the hands of special operations forces during urban assault or close-quarter battle engagements.

### *Glamorous Image, Limited Use*

Most modern military battle carbines, especially those incorporating the bullpup design, can now compete very favorably with submachine guns in terms of compactness and rates of fire. Over time, the intermediate-caliber battle carbine has increasingly encroached upon the submachine gun's niche market, as a bridge between the sidearm (pistol) and the full-size battle rifle. Despite the submachine gun's enduring appeal, it is ultimately a weapon of limited and specific use.

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### Austria

*Steyr Mannlicher GmbH & Co KG.* The only Austrian manufacturer of submachine guns is Steyr Mannlicher, a subsidiary of Steyr-Daimler-Puch.

### *AUG PARA*

Steyr produces a submachine gun version of its Armeegewehr (AUG) family of weapons. This 9x19mm Parabellum variant of the AUG, the 9mm PARA, is currently in production and available for orders. To date, the Austrian Army and Air Force and at least 16 export customers have purchased the 9mm PARA submachine gun.

### *MPi69 and MPi81*

While Steyr no longer produces the 9x19mm Parabellum MPi69 and MPi81 submachine guns, the weapons remain in service worldwide, especially with various paramilitary forces. Pulling on the sling cocks the MPi69; the shooter cocks the MPi81 in the normal manner. Suppressed versions of both weapons are available, as are vehicle/firing port versions.

### *Tactical Machine Pistol*

In 1992, Steyr introduced its latest submachine gun, the 9x19mm Parabellum Tactical Machine Pistol (TMP). Weighing just 1.2 kilograms (2.64 lb) empty and measuring 28 centimeters (11.02 in) in length, the TMP is a delayed blowback-type weapon in which the bolt locks at the instant of firing. The main advantage of the TMP lies in its construction from a composite material, IXEF-1313.

Despite its compact size and 900-round-per-minute firing rate, the TMP is supposedly an easily controlled weapon. While police and internal security units placed the first four orders for the TMP, interest from various military organizations has grown. Steyr also produces the TMP in semi-automatic form as a conventional pistol. The TMP is currently in production for undisclosed customers.

### Belgium

*FN Herstal SA.* For a number of years, this world-famous firm did not produce a proprietary submachine gun design. The Belgian firm is a licensee of Beretta and of Israel Weapon Industries (IWI) – the successor to Israel Military Industries Ltd (IMI) for Israeli small arms production – for production of the Model 12S and Uzi, respectively.

FN Herstal has produced the 9x19mm Parabellum Uzi for sale to Belgium, the German Bundeswehr (Federal Army), pre-revolutionary Iran, the Netherlands, and several unidentified nations. FN may have supplied Uzi submachine guns to the current Iranian regime as well.

FN has exported its license-produced 9x19mm Parabellum Model 12S to Bahrain, Burkina Faso, Chad, Gabon, and Niger. Both weapons are currently in production and available for export.

### *P90: A New Generation*

The 5.7x28mm P90 is actually not a submachine gun (or machine pistol) in the traditional sense, as it does not fire a pistol-caliber cartridge. In fact, it represents a new generation of light battle carbine.

First developed by FN Herstal in 1982, the P90 is a selective-fire blowback weapon that fires from a closed bolt. The weapon's 50-round magazine lies along the top of the receiver, with the 5.7x28mm cartridges aligned perpendicular to the axis of the bore. Overall, the P90 is a very compact weapon that is easy to use and field-strip. The shooter can use the P90 reflex collimating sight with both eyes open. The sight is easily replaceable if damaged.

### *An Intriguing Option*

The 5.7x28mm ammunition gives the P90 a significant range advantage over more conventional submachine guns. This feature apparently accounts for most sales to date. The P90 made its debut on the international market with the sale of 5,000 weapons to Saudi Arabia in 1991. Since then, at least 18 nations, including the United States, have purchased the P90. NATO standardization of the 5.7x28mm cartridge in 1997 further enhanced international sales. The U.S. Marine Corps continues testing the P90 as a possible replacement for its 9x19mm Parabellum M9 pistols.

To enhance the marketability of the P90, FN has developed special operations variants. The P90 LV incorporates a laser-aiming device. The P90 LIR incorporates an infrared night vision sight. Another variant, the Triple Rail (TR), accommodates a variety of sighting devices.

### Czech Republic

*Ceska Zbrojovka AS.* This world-famous Czech arms maker produces the ever-popular Model 61 Skorpion for the international market.

### *CZ-91S Skorpion*

A somewhat recent incarnation of the Skorpion, the CZ-91S, is available in 9x17mm Short and 9x18mm Makarov chamberings, providing considerably more stopping power than the original 7.65x17mm round of the Model 61 (which is still available). In addition to serving with some Czech forces, military police, and internal security units, the Skorpion has been procured by Angola, Libya, and Uganda. The current production

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CZ-91S weapons are semi-automatic only. All models of the Skorpion are available for production orders.

### Germany

*Heckler & Koch GmbH.* This firm is world-renowned for its high-quality, rugged small arms, including submachine guns.

### *MP5: The International Standard*

Developed from the basic 7.62x51mm NATO (.308 Winchester) G3 action, the 9x19mm Parabellum MP5 series of submachine guns reigns as the undisputed standard for modern submachine guns worldwide. The selective-fire MP5 series is currently in service in more than 52 nations. At least six countries produce the MP5 under license.

Special operations forces worldwide have generally adopted the MP5 as the weapon of choice for urban assault/close-quarters combat engagement scenarios. Heckler & Koch produces a comprehensive range of MP5 variants – including weapons featuring an integral suppression capability (MP5 SD) – for military, paramilitary, and law enforcement applications. H&K also produces a full range of accessories and sighting options for the MP5 series.

The compact MP5K PDW variant currently enjoys healthy sales on the international market as a compact, enhanced-firepower alternative to the common sidearm. The most recent manifestations of the MP5 are the 10mm Automatic MP5/10 and .40 Smith & Wesson MP5/40 variants.

### *Personal Defense Weapon*

Like the FN P90, the Heckler & Koch 4.65x30mm PDW is actually a new-generation light battle carbine, as it does not fire pistol-caliber ammunition.

Heckler & Koch began development of this new weapon in the early 1990s, although the company did not release details until 1999. The PDW program is a direct response to a May 1996 European Staff Requirement for a high-firepower personal defense weapon for those troops who do not normally carry a full-size battle rifle or carbine. The gas-operated weapon fires the 4.65x30mm round, developed by (then) Royal Ordnance, from 20- or 40-round magazines. The PDW is currently available for orders. Several military and security organizations are evaluating the weapon.

### Italy

*Fabbrica D'Armi Pietro Beretta SpA.* Beretta, one of the most famous names in small arms, continues to capitalize on the international reputation of its submachine gun line. Beretta has an impressive record

of exporting its submachine guns, especially to developing nations.

### *12S & PM12S2*

Beretta has extended the production life of the 9x19mm Parabellum Model 12 submachine gun with the Model 12S, which features an improved wrap-around bolt to reduce vibrations. The Italian Army and Tunisian forces have procured the Model 12S in quantity, as have several unidentified Middle Eastern and African states. The Indonesian State Arsenals and FN Herstal in Belgium also produce the Model 12S under license. The Model PM12S2, which features improved materials as well as redesigned safety and selector mechanisms, has superseded the Model 12S in production.

### *SMG821*

After Beretta acquired the Luigi Franchi firm in 1995, Franchi continued to produce its successful 9x19mm Parabellum SMG821 submachine gun for some time. In 1990, Franchi acquired the design and production rights to the SMG821 from its original designer and producer, Società Costruzioni Industriali Milano. Although designed to meet paramilitary and security requirements, the SMG821 has seen military service in several African nations. The Italian Army has procured the SMG821 for use by its military police.

Following limited sales of the SMG821 in the United States, MTS Corporation of Philadelphia, Pennsylvania, undertook limited license production. The SMG821 is no longer in serial production.

### Poland

*Fabryka Broni "Lucznik" – Radom Sp.z.o.o.* This player originally gained submachine gun production experience with its 9x18mm Makarov Wz 63 (also known as the PM-63 or RAK) machine pistol.

### *PM-84 & PM-84P Glauberyt*

The PM-84 and PM-84P Glauberyt 9mm machine pistols are essentially modernized versions of the Wz 63 (PM-63 RAK), which is no longer in production. Unlike the Wz 63, the PM-84 receiver does not move during firing; all motion occurs within the internal bolt. The PM-84 also features ambidextrous cocking, a retractable stock, and a new foregrip. These changes allow the shooter to accurately fire the weapon one-handed.

The only differences between the PM-84 and PM-84P are their distinct chamberings:

- The PM-84 fires the Russian 9x18mm Makarov cartridge.
- The PM-84P (intended as the export version) fires the NATO-standard 9x19mm Parabellum round.

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### *PM-98 & PM-98S*

More recently, Lucznik-Radom has further developed the PM-84 design into the 9x19mm Parabellum PM-98 and PM-98S. The PM-98S features a higher rate of fire than the PM-98. Lucznik-Radom maintains both the PM-84 and PM-98 series in production. Both series of submachine guns are currently available for domestic and export sales.

#### Russian Federation

*FSUE Rosoboronexport.* Despite the 1990s breakup of the large State Arsenals into a confusing array of private and semi-private organizations, the Russian Federation remains a hotbed of activity in the submachine gun market. The Rosoboronexport organization acts as the primary conduit between the Russian defense industry and the international market. All individual Russian contractors thus effectively operate under the auspices of Rosoboronexport. Major Russian contractors involved in the submachine gun market include the following:

*Central Scientific Research Institute of Precise Mechanical Engineering (TSNIITOCHMASH).* This semi-autonomous organization is primarily a design house, with some limited production capability. It developed the A-91 family of weapons, including the 9A91 submachine gun. KBP Instrument Design Bureau maintains production of these weapons (see below).

#### ***Baksan***

The 9x19mm Parabellum Baksan is a new entrant in the potentially lucrative personal defense weapon segment of the submachine gun market. Although little information is available regarding the program, unconfirmed reports suggest the weapon may also be available chambered for the 9x18mm 57-N-181SM round. The Baksan features a folding stock and a 20-round magazine. Fully loaded, the Baksan weighs 1.8 kilograms (3.96 lb) and measures 35 centimeters (13.78 in) in length with the stock retracted.

#### ***SR-2***

The latest entrant in the submachine gun market from the Central Scientific Research Institute of Precise Mechanical Engineering is the 9x21mm SR-2. In early 1999, TSNIITOCHMASH first revealed the gas-operated SR-2, chambered for the new 9x21mm Gyurza cartridge, available in the following types:

- SP10 Armor Piercing
- SP11 Frangible
- SP12 Expanding Bullet
- SP13 Armor Piercing Tracer

The weapon's grip houses its 20- or 30-round magazine in a manner reminiscent of the Israeli Uzi. The SR-2 entered production in 1999 for an unidentified customer. Production is ongoing.

*IZHMASH/Kalashnikov.* The Kalashnikov organization is now essentially a design house operating as a privately owned firm, with the IZHMASH factory handling weapons production.

#### ***Bizon***

In 1993, Kalashnikov introduced the Bizon 9x18mm Makarov submachine gun based on components of the Kalashnikov family of battle carbines (especially the AK-74). IZHMASH first made the weapon available for orders in 1999. The first orders arrived shortly thereafter. The Bizon features a 64-round helical feed magazine, a buffer mechanism, and a side-folding stock.

The original model, the Bizon-2, fires the standard 9x18mm Makarov cartridge as well as its improved 57-N-181S variant. Kalashnikov specifically designed the Bizon-2-03 to fire another 9x18mm Makarov round, the 57-N-181SM. For the export market, the Bizon-2-01 fires the NATO-standard 9x19mm Parabellum cartridge. The standard Bizon fires the 9mm Short cartridge.

*KBP Instrument Design Bureau.* This semi-autonomous organization, a descendant of the Tula Arsenal, developed the 9x18mm Makarov PP-90 submachine gun.

#### ***PP-90 Series***

The PP-90 design is unique in that it folds up to a very compact 27x9x32 centimeter size for storage. With a loaded 30-round magazine, it weighs 2.23 kilograms (4.9 lb). The current production models are the slightly lighter 9x19mm Parabellum PP-90M and PP-90M1 models. KBP has also developed the PP-93 (9x18mm Makarov) variant for specialized military and internal security forces. All three variants are in serial production. These submachine guns are also produced under license by Enterprise Metallist of Kazakhstan.

#### ***OTs-22***

The more recent 9x18mm Makarov OTs-22 is a light and compact submachine gun featuring metal pressings and composite materials. The weapon accepts 20- or 30-round magazines. KBP is offering the OTs-22 for export.

#### ***9A91***

KBP has placed the A-91 family of weapons, including the 9A91 submachine gun, into low-rate initial production. Developed by the Central Scientific Research Institute of Precise Mechanical Engineering,

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the compact, gas-operated 9A91 is available in at least four chamberings:

- 9x18mm Makarov
- 9x19mm Parabellum
- 9x39mm SP-5 and SP-6 cartridges

The 9A91 has yet to enter full-scale serial production.

*Klin-Zlatoust Engineering Plant.* This is yet another semi-autonomous organization that has emerged from the old Soviet State Arsenal system.

### ***KEDR & Klin***

Klin-Zlatoust Engineering Plant has developed and placed into production a submachine gun originally designed by the famous Eugene Dragunov. In the early 1990s, the 9x18mm Makarov KEDR entered serial production. The KEDR is a simple, unremarkable design using a 20- or 30-round magazine.

Further development of the KEDR has resulted in a specialized single-shot pistol and the PP-91-01, featuring a combined flash and sound suppressor. Still another KEDR variant is the 9x18mm Makarov Klin machine pistol, which fires the 57-N-181SM round. An export Klin is available in a 9x19mm Parabellum variant.

*Kovrov Mechanical Plant.* This organization has entered the submachine gun market with the AeK-919 Kashtan, a 9x18mm Makarov design to meet the Russian Federal Security Services and Ministry of the Interior requirement for a submachine gun capable of firing the 57-N-181S variant of the standard 9x18mm Makarov cartridge.

### ***AeK-919 Kashtan***

The Kashtan is of advanced design, featuring composite materials and stampings. The weapon fires from an open bolt and has a safety feature preventing operation if dropped. The weapon mounts a suppressor as standard equipment.

Operational testing of the AeK-919 in Chechnya precipitated the issue of a modified weapon, designated AyeK-919, as the current production standard. Kovrov is also reportedly developing a 9x19mm Parabellum variant of the Kashtan for export.

*Rex Firearms.* This player on the market is developing the Gepard, chambered for several different 9mm cartridges. Rex Firearms derived the Gepard from the AKS-74U, with 65 percent parts commonality. The Gepard is a modular weapon system designed for brief but intense actions. It accepts 22- and 40-round magazines.

### United Kingdom

*Bushman/Parker-Hale.* In 1999, Parker-Hale began producing the 9x19mm Parabellum Bushman Individual Defence Weapon, resurrecting the former Bushman firm's failed submachine gun program of the early 1990s.

### ***Bushman IDW***

The blowback IDW incorporates a unique electronic firing rate regulator. This removable device, powered by a lithium dry-cell battery, enables the shooter to adjust the weapon's rate of fire from one round per minute to up to 1,400 rounds per minute. The Parker-Hale IDW is available in compact and carbine versions, in addition to the standard weapon. Parker-Hale has incorporated several improvements into the original Bushman design, including a Picatinny rail optics mount.

In November 2000, John Rothery (Wholesale) Co Ltd acquired Parker-Hale. All new production remains on hold. The firm still offers replacement parts and accessories for existing weapons.

*BAE Systems plc.* In 1988, Royal Ordnance (now a component of BAE Systems) acquired the old Sterling firm, one of the more famous names in the submachine gun field. RO subsequently transferred all production machinery to the Royal Ordnance Small Arms Factory in Nottingham.

### ***L2A3 Sterling***

Both Sterling and (then) Royal Ordnance began separately producing several models of the 9x19mm Parabellum L2A3 Sterling submachine gun in the early 1950s. Produced under license by several of the Commonwealth nations, the weapon was a commercial success for more than 30 years. Simple and efficient to fire, the Sterling is accurate, light of torque, and highly soldier-proof.

At least 92 nations have procured the Sterling, including among them:

- Argentina
- Botswana
- Brunei
- Democratic Republic of the Congo
- Gabon
- Gambia
- Ghana
- India
- Jamaica
- Jordan
- Kenya

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- Kuwait
- Lebanon
- Libya (L34 suppressed model)
- Malawi
- Malaysia
- Myanmar
- New Zealand
- Nigeria
- Oman
- Pakistan
- Sierra Leone
- Singapore
- Somalia
- South Africa
- Sudan
- Swaziland
- Tanzania
- Trinidad and Tobago
- Tunisia
- Uganda
- United Kingdom
- United States (U.S. Marine Corps)
- Zambia
- Zimbabwe

The sheer scale of the Sterling's market must qualify the weapon as one of the most commercially successful weapons of this type ever produced.

**Analysis.** Since its introduction near the end of the First World War, the submachine gun has always been difficult to classify.

## Funding

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The various contractors, some of which are government-owned enterprises or state-owned arsenals, fund the development of submachine guns.

## Timetable

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The current crop of European submachine guns will remain in serial production through the forecast period. Those firms currently producing designs under license will likely develop their own designs in the mid- to long-term range of the forecast period.

### *Ill-Defined Role*

Filling an ill-defined role somewhere between the personal sidearm (pistol) and the full-size battle rifle, the pistol-caliber submachine gun could only offer its compact size and high rate of fire as its defining virtues, mitigating its short range and relatively ineffective pistol-caliber ammunition. Increasingly more compact intermediate-caliber battle carbines are fast eclipsing the submachine gun's niche market in general service worldwide.

### *Mystique vs. Utility*

Still, the submachine gun remains a popular weapon, perhaps more because of the mystique surrounding it than its actual utility in combat. The ubiquitous images of Thompson submachine guns and MP38/40 machine pistols from the Second World War remain solidly entrenched in the popular culture. The near-universal adoption of the Heckler & Koch MP5 by special operations forces worldwide as the weapon of choice for highly specialized urban assault and close-quarters combat missions propelled the submachine gun to a whole new level of popularity. By 1988, the MP5 had a worldwide production rate of 1,000 weapons per week.

The development of new types of intermediate-caliber battle carbines is likely to be the most significant factor affecting the submachine gun market going forward. However, many countries, including many European nations, simply cannot afford to develop and procure new "families" of modular small arms that would supplant the submachine gun in general use. For this practical reason, as well as continued popular demand, the submachine gun will continue to survive as a significant component of most armed forces worldwide.

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### Worldwide Distribution/Inventories

**Export Potential.** Most European submachine gun manufacturers produce their weapons primarily for domestic procurement and sales. Heckler & Koch and Beretta continue to dominate the international submachine gun market. We do not expect the market dominance of H&K and Beretta to fade during the forecast period.

**Countries.** Because most contracts go unreported, it is virtually impossible to determine the precise distribution of European submachine guns.



Heckler & Koch 9x19mm Parabellum MP5 Submachine Gun

Source: Heckler & Koch GmbH

### Forecast Rationale

Despite the steady encroachment of modern, compact, intermediate-caliber battle carbines, European players continue to develop and produce a wide variety of submachine guns (or machine pistols, as they are known in Europe). Indeed, Heckler & Koch and Beretta continue to dominate the international submachine gun market with their popular designs.

While total submachine gun production has declined significantly over the past two decades, the number of new players and programs has actually increased since the early 1990s. This reflects the international phenomenon of an increasing number of smaller players

operating in what remains a relatively stable market that is dominated by a few major players.

The Forecast International Weapons Group expects the European submachine gun market to remain generally stable, supported by its historical procurement patterns. The established European players will continue as leaders in the industry, as technological innovation remains evolutionary rather than revolutionary.

The combined output of European submachine gun manufacturers will average at least 10,000 weapons per year.

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