

# C4I FORECAST

## SAMPLE



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## Analysis 2

# The Market for Multimission Communications Systems

## Executive Summary

The multimission communications systems used by the military can be installed in multiple platforms and configured in more than one way. Such systems are critical to carrying out military operations, as they enable information to be shared among defense personnel and military weapons and systems.

Forecast International is projecting that defense departments worldwide will spend some **\$4.15 billion** on **24** different multimission communications development, acquisition, and maintenance programs over the next 10 years. More specifically, this amount will be allocated for the development, procurement, or maintenance of multimission communications systems or technology. Additionally, from among the **22** multimission communications products examined in this analysis, defense departments will buy **349,394** individual units over the next decade.

The chief factors propelling spending for multimission communications are the desire of defense departments to use software-operated military communications systems and the need to sustain the software-based communications waveforms and network management of the now-defunct Joint Tactical Radio System (JTRS).

Forecast International expects the Joint Tactical Networks (JTN) program (successor to the Joint Tactical Radio program) and the Bowman Tactical Radio program, as well as production of the Single Channel Ground and Airborne Radio System (SINCGARS), to have a significant influence on the market for multimission communications systems in the coming decade, as detailed below.

The JTRS was a U.S. Department of Defense program to develop and produce a single standard software-based radio system for the U.S. armed services. On September 30, 2012, the JTRS program was officially closed. The JTRS Joint Program Executive Office has been replaced by the Joint Tactical Networking Center (JTNC) of the Joint Tactical Networks program, which is responsible for the development and sustainment of JTRS software-based communications waveforms and network management. The JTNC will develop and/or modernize software-based radio waveforms as well as test and certify industry partner tactical networking devices to ensure interoperability across the U.S. military services.

The U.K. Ministry of Defence's Bowman Tactical Radio program is geared toward the procurement of a family of multimission communications combat radios for the British armed services. General Dynamics UK Ltd is the Bowman program's prime contractor. General Dynamics UK chose Exelis Inc and Harris Corporation to provide most of the multimission communications systems for the Bowman program (Harris later purchased Exelis Inc in February 2015). Forecast International projects that the British armed services will buy approximately **4,620** tactical radios under the Bowman program from 2018 to 2027.

The SINCGARS is a family of man-portable vehicular, and airborne radios manufactured by Harris. The software-based design of the SINCGARS prolongs the life of the radios over time, allowing new capabilities to be added well into the future. The PRC-119 has long been one of the most popular members of the SINCGARS family of military radios.

Competition for business within the multimission communications market will remain healthy over the next decade. From 2018 to 2027, the following five companies are expected to generate the most revenue from performing work related to the 24 multimission communications systems and programs that comprise this analysis:

1. Harris Corporation
2. General Dynamics
3. Thales
4. Rockwell Collins
5. Barrette Communications

Forecast International is projecting that in the following 10 years, these five companies will receive more than three-quarters of the total amount that defense departments worldwide will spend on the 24 systems and programs covered in this analysis. Harris will lead with \$2.67 billion in revenue. General Dynamics, Thales, Rockwell Collins, and Barrette Communications will follow with \$398.03 million, \$170.46 million, \$51.99 million, and \$50.20 million in revenue, respectively.

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