

The Global Military IT, Data and Computing
Market 2014–2024



TABLE OF CONTENTS

1	Introduction	13
1.1	What is this Report About?	13
1.2	Definitions	13
1.3	Summary Methodology.....	15
1.4	About Strategic Defence Intelligence.....	16
2	Executive Summary	17
3	Global Military IT, Data, and Computing Market Size and Drivers	19
3.1	Military IT, Data, and Computing Market Size and Forecast 2014–2024.....	19
3.1.1	Global military IT, data, and computing market to show positive growth during the forecast period.....	19
3.2	Global Military IT, Data and Computing Market – Regional Analysis	20
3.2.1	North America to drive the demand for the military IT, data & computing market over the forecast period 20	
3.2.2	Focus on Network Centric Warfare by the US to drive the region’s market	22
3.2.3	Military IT, data and computing market to be robust in Europe	23
3.2.4	Military IT, data and computing market to exhibit a CAGR of XX% in the Asia-Pacific region	25
3.2.5	Spending in the Middle East expected to be driven by an increased focus on networking and cyber security	27
3.2.6	Brazil and Chile to drive the military IT, data and computing sector in the Latin American region.....	28
3.2.7	Markets in Africa expected to increase over the forecast period	29
3.3	Military IT, Data and Computing Sub–Sector Market Size Composition.....	30
3.3.1	Networking segment to account for the highest expenditure in the military IT, data and computing market	30
3.3.2	Cyber security expected to constitute the second largest segment of expenditure over the forecast period	32
3.3.3	Investment in the software segment of military IT, data and computing to grow at a CAGR of XX%	34
3.3.4	Hardware expected to register a CAGR of XX% during the forecast period	35
3.4	Demand Drivers and Growth Stimulators.....	36
3.4.1	Network centric warfare driving the market.....	36
3.4.2	Dynamic nature of cyber threats warrants increased spending on innovative technologies	36
3.4.3	Demand for military embedded computers to drive the market in major defense spending nations	36
3.4.4	Cyber security spending to drive the military data, IT and computing sector	37
3.5	Defense Budget Spending Review	38
3.5.1	European capital expenditure expected to increase during the forecast period	38
3.5.2	Asian defense budgets expected to increase at a robust pace	39
3.5.3	North American defense expenditure projected to increase marginally during the forecast period	40

The Global Military IT, Data and Computing Market 2014–2024

3.5.4	Modernization programs likely to drive defense expenditure in South American countries	41
3.5.5	Military budgets of African countries expected to increase during the forecast period	42
3.5.6	Defense budgets of Middle Eastern countries likely to increase during the forecast period	43
3.6	Defense Modernization Review	44
3.6.1	Financial constraints causing delays in European defense modernization programs	44
3.6.2	Defense budgets of Asian countries likely to be driven by competitive arms acquisitions	44
3.6.3	Global economic slowdown leading to defense budget cuts in the North American region	44
3.6.4	Need to replace aging equipment driving South American defense expenditure	45
3.6.5	Security threats increasing the defense budget of African countries	45
3.6.6	Demand for air defense systems is likely to increase in the Middle East	45
4	Industry Trends, Recent Developments and Challenges.....	47
4.1	Technological Developments.....	47
4.1.1	Machine Learning technology to be the new platform for future cyber security measures.....	47
4.1.2	Scientists from the University of Aberdeen developing software to enable humans to reason with computers	47
4.1.3	Raytheon developing unmanned aircraft software.....	47
4.1.4	US Navy develops technology to predict pirate attacks.....	48
4.1.5	US Army developing foundational software for a common operating environment (COE).....	48
4.2	Market Trends	49
4.2.1	Lightweight computing devices are gaining popularity.....	49
4.2.2	Growth in cloud computing to enhance cyber security	49
4.2.3	Development of offensive cyber weapons on the rise	49
4.2.4	High performance embedded computing (HPEC) gaining market traction.....	50
4.2.5	Countries investing significantly to find attack patterns in cyber crimes	50
4.2.6	Adoption of open-source software to increase flexibility and lower cost.....	51
4.3	Industry Consolidation.....	52
4.3.1	Joint ventures expected to increase over the forecast period	52
4.3.2	The currently fragmented military computing and cyber security industry to witness a phase of consolidation.....	52
4.4	Key Challenges	54
4.4.1	High costs and schedule overruns marring successful implementation of enterprise resource planning systems.....	54
4.4.2	Mobile and Wireless technologies increasing vulnerability of cyber networks.....	54
4.4.3	Lack of exhaustive databases on malware and their sources impeding the growth in the global cyber defense sector	54
4.4.4	Counter measures against cyber weapons expected to be a significant challenge in the future	55
5	SWOT Analysis of the Military IT, Data and Computing Market	56

The Global Military IT, Data and Computing Market 2014–2024

5.2	Strengths.....	57
5.2.1	Increased focus on network centricity.....	57
5.2.2	Cyber Security initiatives providing impetus to military IT spending.....	57
5.2.3	Technological advancements ensure continued operational demand for cyber security solutions.....	58
5.3	Weaknesses.....	59
5.3.1	Lack of skilled personnel in the cyber security segment.....	59
5.3.2	Current military information management solutions facing technological and budgetary issues.....	59
5.4	Opportunities.....	60
5.4.1	Need for databases to effectively combat cyber crime.....	60
5.4.2	Demand for Commercial off the Shelf (COTS) embedded computing to grow significantly.....	60
5.5	Threats.....	61
5.5.1	US and European economic crisis.....	61
5.5.2	Lack of transparency in information sharing.....	61
6	Country Analysis – Military IT, Data and Computing Market.....	62
6.1	United States Market Size and Forecast 2014–2024.....	62
6.1.1	The US networking market to witness highest spending during the forecast period.....	65
6.1.2	Enterprise resource planning systems to drive the US military software category.....	66
6.1.3	Hardware spending to record a CAGR of XX% over the forecast period.....	68
6.2	The United Kingdom Market Size and Forecast 2014–2024.....	69
6.2.1	The networking market in the UK to witness highest spending during the forecast period.....	72
6.2.2	Cyber Security market to constitute the second largest spending.....	74
6.2.3	Software spending to witness a CAGR of XX% over the forecast period.....	76
6.3	France Market Size and Forecast 2014–2024.....	77
6.3.1	Networking to account for the largest segment of expenditure on military IT in France.....	80
6.3.2	Software segment to constitute second largest market.....	82
6.3.3	Cyber security to account for the third largest segment of expenditure in France.....	84
6.4	Russia Market Size and Forecast 2014–2024.....	86
6.4.1	Networking to emerge as the largest segment of expenditure by Russia on military IT, data and computing.....	88
6.4.2	Market for cyber security to grow at a CAGR of XX% over the forecast period.....	90
6.5	China Market Size and Forecast 2014–2024.....	92
6.5.1	Cyber Security segment is expected to constitute the largest market share in China.....	94
6.5.2	Spending on networking expected to exhibit a CAGR of XX% during the forecast period.....	96
6.5.3	Software market to witness third highest spending during the forecast period.....	97
6.6	Indian Market Size and Forecast 2014–2024.....	98
6.6.1	India’s networking market to witness the highest spending during the forecast period.....	100

The Global Military IT, Data and Computing Market 2014–2024

6.6.2	Spending on cybersecurity expected to exhibit a CAGR of XX% during the forecast period	102
6.6.3	Software market to constitute the third largest spending	104
6.7	Australia Market Size and Forecast 2014–2024	105
6.7.1	Spending on networking expected to exhibit a CAGR of XX% during the forecast period.....	108
6.7.2	Cybersecurity market to register highest CAGR of XX% over the forecast period.....	109
6.8	The UAE Market Size and Forecast 2014–2024	110
6.8.1	Cyber security to witness robust spending during the forecast period	112
6.8.2	Spending on networking expected to exhibit a CAGR of XX% during the forecast period.....	114
6.9	Saudi Arabia Market Size and Forecast 2014–2024	115
6.9.1	Spending on cyber security is expected to witness a CAGR of XX% during the forecast period.....	117
6.10	Brazil Market Size and Forecast 2014–2024	118
6.10.1	Software segment dominates the Brazilian military IT expenditure	120
6.10.2	Cybersecurity expected to register a CAGR of XX% over the forecast period	121
6.11	Chile Market Size and Forecast 2014–2024	122
6.11.1	Chilean software segment is expected to be the largest of its military IT, data and computing market	124
6.12	South Africa Market Size and Forecast 2014–2024	125
6.12.1	Software market to witness highest spending during the forecast period.....	127
6.12.2	Cybersecurity expected to register the highest CAGR of XX% during the forecast period	128
7	Major Military IT, Data and Computing Programs.....	129
7.1	Networking	129
7.1.1	US - Defense Information System Network (DISN)	129
7.1.2	US - Warfighter Information Network Tactical (WIN-T) Increment 2 & 3	130
7.1.3	UK - Defense Information Infrastructure (DII) program.....	131
7.1.4	Australia - JP 2072 - Battlespace Communications System Program	132
7.1.5	US - Army Private Cloud (APC2)	133
7.2	Hardware.....	134
7.2.1	France - Second Generation Fire Control Computers project	134
7.2.2	US - MCSC- Computer Systems and Accessories Procurement Program	135
7.2.3	US - Test and Evaluation Mission Support Services (TEMSS) program	136
7.3	Software.....	137
7.3.1	US - Navy Enterprise Resource Planning (ERP)	137
7.3.2	France - SCORPION program	138
7.3.3	US - Radar Software Development Program	139
7.3.4	US - Global Combat Support System (GCSS)-Army.....	140
7.4	Cyber Security.....	141
7.4.1	US - Einstein Intrusion Detection Program	141

The Global Military IT, Data and Computing Market 2014–2024

7.4.2 US - Cyberspace science, research, engineering and technology integration program.....142

7.4.3 US - National Cyber Range Program.....143

8 Competitive Landscape and Strategic Insights 144

8.1 Competitive Landscape overview 144

8.1.1 Exelis, Inc.: Overview146

8.1.2 Exelis, Inc.: Products and Services146

8.1.3 Exelis, Inc.: Alliances.....146

8.1.4 Exelis, Inc.: Recent Contract Wins.....147

8.1.5 Exelis, Inc.: Financial Analysis147

8.1.6 Raytheon: Overview149

8.1.7 Raytheon: Products and Services149

8.1.8 Raytheon: Alliances.....149

8.1.9 Raytheon: Recent Contract Wins150

8.1.10 Raytheon: Financial Analysis150

8.1.11 Booz Allen Hamilton: Overview.....152

8.1.12 Booz Allen Hamilton: Products and services152

8.1.13 Booz Allen Hamilton: Alliances153

8.1.14 Booz Allen Hamilton: Recent contract wins153

8.1.15 Booz Allen Hamilton: Financial analysis154

8.1.16 Presagis: Overview155

8.1.17 Presagis: Products and Services155

8.1.18 Presagis: Alliances156

8.1.19 Presagis: Recent Contract Wins156

8.1.20 Elbit Systems: Overview.....157

8.1.21 Elbit Systems: Products and services157

8.1.22 Elbit Systems: Alliances157

8.1.23 Elbit Systems: Recent contract wins158

8.1.24 Elbit Systems: Financial analysis158

8.1.25 SAP AG: Overview160

8.1.26 SAP AG: Products and Services.....160

8.1.27 SAP AG: Alliances.....160

8.1.28 SAP AG: Recent Contract Wins.....160

8.1.29 SAP AG: Financial Analysis160

8.1.30 Thales: Overview.....162

8.1.31 Thales: Products and services162

8.1.32 Thales: Alliances163

8.1.33 Thales: Recent contract wins163

The Global Military IT, Data and Computing Market 2014–2024

8.1.34 Thales: Financial analysis164

8.1.35 Lockheed Martin: Overview.....166

8.1.36 Lockheed Martin: Products and Services.....166

8.1.37 Lockheed Martin: Alliances167

8.1.38 Lockheed Martin: Recent Contract Wins.....167

8.1.39 Lockheed Martin: Financial Analysis.....168

8.1.40 Northrop Grumman: Overview170

8.1.41 Northrop Grumman: Products and Services170

8.1.42 Northrop Grumman: Alliances.....170

8.1.43 Northrop Grumman: Recent Contract Wins171

8.1.44 Northrop Grumman: Financial Analysis171

8.1.45 BAE Systems: Overview173

8.1.46 BAE Systems: Products and Services173

8.1.47 BAE Systems: Alliances.....174

8.1.48 BAE Systems: Recent Contract Wins174

8.1.49 BAE Systems: Financial Analysis175

8.1.50 DRS Tactical Systems: Overview176

8.1.51 DRS Tactical Systems: Products and Services176

8.1.52 DRS Tactical Systems: Recent Contract Wins177

8.1.53 Dynamic Research Corporation: overview.....177

8.1.54 Dynamic Research Corporation: products and services.....177

8.1.55 Dynamic Research Corporation: alliances.....178

8.1.56 Dynamic Research Corporation: recent contract wins.....178

8.1.57 Dynamic Research Corporation: financial analysis.....179

8.1.58 SAIC: Overview180

8.1.59 SAIC: Products and Services.....180

8.1.60 SAIC: Recent Contract Wins.....181

8.1.61 SAIC: Financial Analysis181

8.1.62 Microsoft: Overview183

8.1.63 Microsoft: Products and Services.....183

8.1.64 Microsoft: Alliances185

8.1.65 Microsoft: Recent Contract Wins.....185

8.1.66 Microsoft: Financial Analysis.....185

8.1.67 General Dynamics: Overview.....187

8.1.68 General Dynamics: Products and Services187

8.1.69 General Dynamics: Alliances188

8.1.70 General Dynamics: Recent Contract Wins.....188

The Global Military IT, Data and Computing Market 2014–2024

8.1.71	General Dynamics: Financial Analysis.....	189
8.1.72	Hewlett Packard: Overview	191
8.1.73	Hewlett Packard: Products and Services	191
8.1.74	Hewlett Packard: Recent Contract Wins.....	191
8.1.75	Hewlett Packard: Financial Analysis	192
9	Appendix	194
9.1	Methodology.....	194
9.2	About SDI.....	194
9.3	Disclaimer	194

SAMPLE PAGES

The Global Military IT, Data and Computing Market 2014–2024

LIST OF FIGURES

Figure 1: Global Military IT, Data and Computing Market (US\$ Billion), 2014–2024.....	19
Figure 2: Military IT, Data and Computing Market Breakdown by Region (%), 2014–2024.....	21
Figure 3: North American Military IT, Data and Computing Market (US\$ Billion), 2014–2024.....	22
Figure 4: European Military IT, Data and Computing Market (US\$ Billion), 2014–2024.....	24
Figure 5: Asia-Pacific Military IT, Data and Computing Market (US\$ Billion), 2014–2024.....	26
Figure 6: Middle East Military IT, Data and Computing Market (US\$ Billion), 2014–2024.....	27
Figure 7: Latin American Military IT, Data and Computing Market (US\$ Million), 2014–2024.....	28
Figure 8: African Military IT, Data and Computing Market (US\$ Million), 2014–2024.....	29
Figure 9: Military IT, Data and Computing Market Breakdown by Segment (%), 2014–2024.....	31
Figure 10: Cyber Security Market Size (US\$ Billion), 2014–2024.....	33
Figure 11: Software Market Size (US\$ Billion), 2014–2024.....	34
Figure 12: Hardware Market Size (US\$ Billion), 2014–2024.....	35
Figure 13: Defense Capital Expenditure of Top Three European Defense Spenders (US\$ Billion), 2014–2024.....	38
Figure 14: Defense Capital Expenditure of Top Three Asian Defense Spenders (US\$ Billion), 2014–2024.....	39
Figure 15: Defense Capital Expenditure of Top Three North American Defense Spenders (US\$ Billion), 2014–2024.....	40
Figure 16: Defense Capital Expenditure of Top Three South American Defense Spenders (US\$ Billion), 2014–2024.....	41
Figure 17: Defense Capital Expenditure of Top Three African Countries (US\$ Billion), 2014–2024.....	42
Figure 18: Defense Capital Expenditure of Top Three Middle Eastern Defense Spenders (US\$ Billion), 2014–2024.....	43
Figure 19: Military IT, Data and Computing Market in the US (US\$ Billion), 2014–2024.....	63
Figure 20: Military IT, Data and Computing Market Split By Category in the US (%), 2014–2024.....	64
Figure 21: Networking Market Size in the US (US\$ Billion), 2014–2024.....	65
Figure 22: Software Market Size in the US (US\$ Billion), 2014–2024.....	67
Figure 23: Hardware Market Size in the US (US\$ Billion), 2014–2024.....	68
Figure 24: Military IT, data and Computing Market in the UK (US\$ Billion), 2014–2024.....	70
Figure 25: Military IT, Data and Computing Market Split by Sector in UK (%), 2014–2024.....	71
Figure 26: Networking Market Size in the UK (US\$ Billion), 2014–2024.....	73
Figure 27: Cyber Security Market Size in the UK (US\$ Billion), 2014–2024.....	75
Figure 28: Software Market Size in the UK (US\$ Million), 2014–2024.....	76
Figure 29: Military IT, Data and Computing Market in France (US\$ Billion), 2014–2024.....	78
Figure 30: Military IT, Data and Computing Market Split by Sector in France (%), 2014–2024.....	79
Figure 31: Networking Market Size in France (US\$ Million), 2014–2024.....	81
Figure 32: Software Market Size in France (US\$ Million), 2013–2024.....	83
Figure 33: Cybersecurity Market Size in France (US\$ Million), 2014–2024.....	85
Figure 34: Military IT, Data and Computing Market in Russia (US\$ Billion), 2014–2024.....	87
Figure 35: Military IT, Data and Computing Market Split by Sector in Russia (%), 2014–2024.....	87
Figure 36: Networking Market Size in Russia (US\$ Million), 2014–2024.....	89
Figure 37: Cyber Security Market Size in Russia (US\$ Million), 2014–2024.....	91
Figure 38: Military IT, Data and Computing Market in China (US\$ Billion), 2014–2024.....	93
Figure 39: Military IT, Data and Computing Split by Sector in China (%), 2014–2024.....	93
Figure 40: Cyber Security Market Size in China (US\$ Million), 2014–2024.....	95
Figure 41: Networking Market Size in China (US\$ Million), 2014–2024.....	96
Figure 42: Software Market Size in China (US\$ Million), 2014–2024.....	97
Figure 43: Military IT, Data and Computing Market in India (US\$ Billion), 2014–2024.....	99
Figure 44: Military IT, Data and Computing Split by Sector in India (%), 2014–2024.....	99
Figure 45: Networking Market Size in India (US\$ Million), 2014–2024.....	101
Figure 46: Cyber Security Market Size in India (US\$ Million), 2014–2024.....	103
Figure 47: Software Market Size in India (US\$ Million), 2014–2024.....	104
Figure 48: Military IT, Data and Computing Market in Australia (US\$ Million), 2014–2024.....	106
Figure 49: Military IT, Data and Computing Market Split by Sector in Australia (%), 2014–2024.....	107
Figure 50: Networking Market Size in Australia (US\$ Million), 2014–2024.....	108
Figure 51: Cyber Security Market Size in Australia (US\$ Million), 2014–2024.....	109
Figure 52: Military IT, Data and Computing Market in the UAE (US\$ Billion), 2014–2024.....	111
Figure 53: Military IT, Data and Computing Split by Sector in the UAE (%), 2014–2024.....	111
Figure 54: Cyber Security Market Size in the UAE (US\$ Million), 2014–2024.....	113

The Global Military IT, Data and Computing Market 2014–2024

Figure 55: Networking Market Size in the UAE (US\$ Million), 2014–2024.....	114
Figure 56: Military IT, Data and Computing Market in Saudi Arabia (US\$ Billion), 2014–2024	116
Figure 57: Military IT, Data and Computing Split by Sector in the Saudi Arabia (%), 2014–2024.....	116
Figure 58: Cyber Security Market Size in Saudi Arabia (US\$ Million), 2014–2024	117
Figure 59: Military IT, Data and Computing Market in Brazil (US\$ Million), 2014–2024	119
Figure 60: Military IT, Data and Computing Market Split By Category in Brazil (%), 2014–2024.....	119
Figure 61: Software Market Size in Brazil (US\$ Million), 2014–2024.....	120
Figure 62: Cyber Security Market Size in Brazil (US\$ Million), 2014–2024.....	121
Figure 63: Military IT, Data and Computing Market in Chile (US\$ Million), 2014–2024.....	123
Figure 64: Military IT, Data and Computing Market Split By Category in Chile (%), 2014–2024	123
Figure 65: Software Market Size in Chile (US\$ Million), 2014–2024	124
Figure 66: Military IT, Data and Computing Market in South Africa (US\$ Million), 2014–2024.....	126
Figure 67: Military IT, Data and Computing Split by Sector in South Africa (%), 2014–2024	126
Figure 68: Software Market Size in South Africa (US\$ Million), 2014–2024	127
Figure 69: Cybersecurity Market Size in South Africa (US\$ Million), 2014–2024.....	128
Figure 70: Exelis – Revenue Trend Analysis (US\$ Billion), 2008–2012.....	147
Figure 71: Exelis – Operating Profit (US\$ Million), 2008–2012.....	148
Figure 72: Exelis – Net Profit Trend Analysis (US\$ Million), 2008–2012	148
Figure 73: Raytheon – Revenue Trend Analysis (US\$ Billion), 2008–2012.....	151
Figure 74: Raytheon – Operating Profit (US\$ Million), 2008–2012.....	151
Figure 75: Raytheon – Net Profit Trend Analysis (US\$ Million), 2008–2012.....	152
Figure 76: Booz Allen Hamilton – Revenue Trend Analysis (US\$ billion), 2008–2012.....	154
Figure 77: Booz Allen Hamilton – Operating Profit (US\$ million), 2008–2012	154
Figure 78: Booz Allen Hamilton – Net Profit Trend Analysis(US\$ million), 2008–2012.....	155
Figure 79: Elbit Systems – Revenue Trend Analysis (US\$ Billion), 2008–2012.....	158
Figure 80: Elbit Systems – Operating Profit (US\$ Million), 2008–2012.....	159
Figure 81: Elbit Systems – Net Profit Trend Analysis (US\$ Million), 2008–2012	159
Figure 82: SAP AG – Revenue Trend Analysis (EUR Billion), 2008–2012	161
Figure 83: SAP AG – Operating Profit (EUR Billion), 2008–2012.....	161
Figure 84: SAP AG – Net Profit Trend Analysis (EUR Billion), 2008–2012.....	162
Figure 85: Thales – Revenue Trend Analysis (EUR billion), 2008–2012.....	164
Figure 86: Thales – Operating Profit (EUR million), 2008–2012.....	165
Figure 87: Thales – Net Profit Trend Analysis (EUR million), 2008–2012.....	165
Figure 88: Lockheed Martin – Revenue Trend Analysis (US\$ Billion), 2009–2013.....	168
Figure 89: Lockheed Martin – Operating Profit (US\$ Million), 2009–2013.....	169
Figure 90: Lockheed Martin – Net Profit Trend Analysis (US\$ Million), 2009–2013.....	169
Figure 91: Northrop Grumman – Revenue Trend Analysis (US\$ Billion), 2008–2012.....	172
Figure 92: Northrop Grumman – Operating Profit (US\$ Million), 2008–2012.....	172
Figure 93: Northrop Grumman – Net Profit Trend Analysis (US\$ Million), 2008–2012.....	173
Figure 94: BAE Systems – Revenue Trend Analysis (GBP Billion), 2008–2012.....	175
Figure 95: BAE Systems – Operating Profit (GBP Million), 2008–2012.....	175
Figure 96: BAE Systems – Net Profit Trend Analysis (GBP Million), 2008–2012.....	176
Figure 97: Dynamic Research Corporation – Revenue Trend Analysis (US\$ million), 2008–2012	179
Figure 98: Dynamic Research Corporation – Operating Profit (US\$ million), 2008–2012	179
Figure 99: Dynamic Research Corporation – Net Profit Trend Analysis (US\$ million), 2008–2012.....	180
Figure 100: SAIC – Revenue Trend Analysis (US\$ Billion), 2009–2013.....	182
Figure 101: SAIC – Operating Profit (US\$ Million), 2009–2013.....	182
Figure 102: SAIC – Net Profit Trend Analysis (US\$ Million), 2009–2013.....	183
Figure 103: Microsoft – Revenue Trend Analysis (US\$ Billion), 2009–2013.....	186
Figure 104: Microsoft – Operating Profit (US\$ Billion), 2009–2013	186
Figure 105: Microsoft – Net Profit Trend Analysis (US\$ Billion), 2009–2013	187
Figure 106: General Dynamics – Revenue Trend Analysis (US\$ Billion), 2009–2013	189
Figure 107: General Dynamics – Operating Profit (US\$ Billion), 2009–2013.....	190
Figure 108: General Dynamics – Net Profit Trend Analysis (US\$ Billion), 2009–2013.....	190
Figure 109: Hewlett Packard – Revenue Trend Analysis (US\$ Billion), 2009–2013	192
Figure 110: Hewlett Packard – Operating Profit (US\$ Billion), 2009–2013.....	193
Figure 111: Hewlett Packard – Net Profit Trend Analysis (US\$ Billion), 2009–2013.....	193

The Global Military IT, Data and Computing Market 2014–2024

LIST OF TABLES

Table 1: Global Military IT, Data and Computing Market Overview	20
Table 2: Global Military IT, Data and Computing Market Overview	30
Table 3: SWOT Analysis of the Military IT, Data and Computing market	56
Table 4: US Military IT, Data and Computing Market Overview	62
Table 5: Key US Military IT, Data and Computing Programs	63
Table 6: UK Military IT, Data and Computing Market Overview	70
Table 7: Major UK military IT, data and Computing Programs	71
Table 8: French military IT, Data and Computing Market Overview	77
Table 9: Major French Military IT, Data and Computing Programs	78
Table 10: Russia Military IT, Data and Computing Market Overview	86
Table 11: Chinese Military IT, Data and Computing Market Overview	92
Table 12: Indian Military IT, Data and Computing Market Overview	98
Table 13: Australian Military IT, Data and Computing Market Overview	105
Table 14: Major French Military IT, Data and Computing Programs	106
Table 14: UAE Military IT, Data and Computing Market Overview	110
Table 15: Saudi Arabian Military IT, Data and Computing Market Overview	115
Table 16: Brazilian Military IT, Data and Computing Market Overview	118
Table 17: Chilean Military IT, Data and Computing Market Overview	122
Table 18: South African Military IT, Data and Computing Market Overview	125
Table 19: Program Details – Army Private Cloud (APC2) Program	129
Table 20: Program Details – Army Private Cloud (APC2) Program	130
Table 21: Program Details – Defense Information Infrastructure (DII) program	131
Table 22: Program Details – Battlespace Communications System Program	132
Table 23: Program Details – Army Private Cloud (APC2) Program	133
Table 24: Program Details – Second Generation Fire Control Computers project	134
Table 25: Program Details – MCSC- Computer Systems and Accessories Procurement Program	135
Table 26: Program Details – Test and Evaluation Mission Support Services (TEMSS) Program	136
Table 27: Program Details – Defense Enrollment Eligibility Reporting System	137
Table 28: Program Details – Scorpion Program	138
Table 29: Program Details – Radar Software Development Program	139
Table 30: Program Details – Defense Enrollment Eligibility Reporting System	140
Table 31: Program Details – Einstein Intrusion Detection System	141
Table 32: Program Details – Cyberspace Science, Research, Engineering And Technology Integration	142
Table 33: Program Details – National Cyber Range Program	143
Table 34: Key Global Military IT, Data and Computing Manufacturers and Capabilities	145
Table 35: Exelis – Alliances	146
Table 36: Exelis – Recent Contract Wins	147
Table 37: Raytheon – Alliances	149
Table 38: Raytheon – Recent Contract Wins	150
Table 39: Booz Allen Hamilton: Alliances	153
Table 40: Booz Allen Hamilton: Recent Contract Wins	153
Table 41: Presagis – Alliances	156
Table 42: Presagis – Recent Contract Wins	156
Table 43: Elbit Systems – Alliances	157
Table 44: Elbit Systems – Recent Contract Wins	158
Table 45: SAP AG – Alliances	160
Table 46: SAP AG – Recent Contract Wins	160
Table 47: Thales – Alliances	163
Table 48: Thales – Recent Contract Wins	163
Table 49: Lockheed Martin – Alliances	167
Table 50: Lockheed Martin – Recent Contract Wins	167
Table 51: Northrop Grumman – Alliances	170
Table 52: Northrop Grumman – Recent Contract Wins	171
Table 53: BAE Systems – Alliances	174

The Global Military IT, Data and Computing Market 2014–2024

Table 54: BAE Systems – Recent Contract Wins.....	174
Table 55: DRS Tactical Systems – Recent Contract Wins	177
Table 56: Dynamic Research Corporation: Alliances	178
Table 57: Dynamic Research Corporation: Recent Contract Wins	178
Table 58: SAIC – Recent Contract Wins	181
Table 59: Microsoft – Recent Contract Wins	185
Table 60: General Dynamics – Alliances	188
Table 61: General Dynamics – Recent Contract Wins	188
Table 62: Hewlett Packard – Recent Contract Wins.....	191

SAMPLE PAGES

Executive Summary

The global military IT, data, and computing market is expected to grow at a CAGR of XX% during the forecast period

The global military IT, data, and computing market is expected to value US\$XX billion by the end of 2014, which is estimated to increase to US\$XX billion by 2024, representing a CAGR of XX% during the forecast period. The global market is expected to achieve a cumulative value of US\$XX billion during the forecast period. Demand for such systems is anticipated to be driven by rapid technological advancements and the burgeoning interest of military nations in areas such as network centric warfare, embedded computing, information security, cloud computing, and cyber security. The military IT data and computing market is expected to be dominated by North America, followed by Europe and Asia Pacific. A major factor driving spending in this sector is the transition of modern warfare, from the battleground to networks and cyber space, with militaries across the world spending significantly on the development of their defensive and offensive capabilities in the areas of network centric warfare and cyber security.

SAMPLE PAGE

The Global Military IT, Data and Computing Market 2014–2024

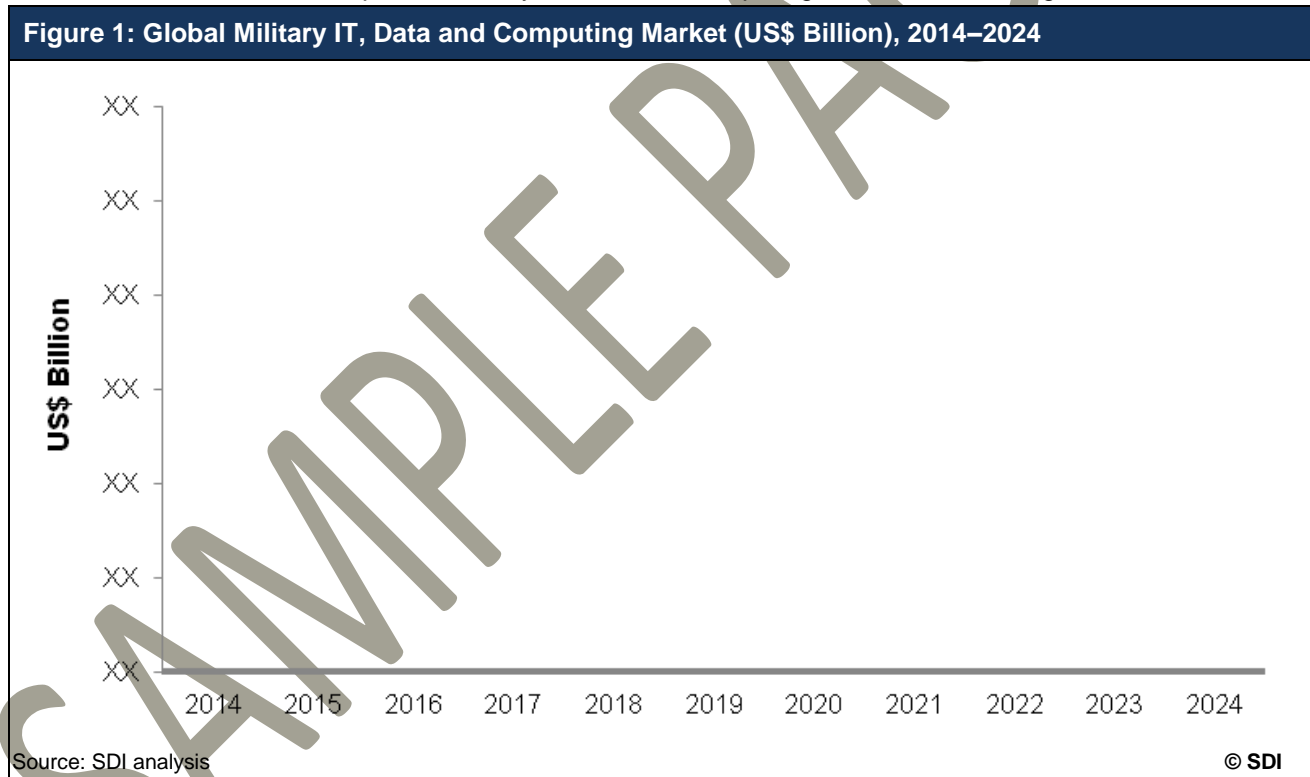
1 Global Military IT, Data and Computing Market Size and Drivers

1.1 Military IT, Data, and Computing Market Size and Forecast 2014–2024

1.1.1 Global military IT, data, and computing market to show positive growth during the forecast period

The global military IT, data, and computing market is estimated to value US\$XX billion in 2014 and increase at a CAGR of XX% during the forecast period, to reach its peak of US\$XX billion by 2024. The market consists of four categories: networking, software, cyber security, and hardware. The networking segment is expected to account for XX% of the global military IT, data, and computing market, followed by the cybersecurity segment with a share of XX%. The software market will account for XX% of the overall military IT, data and computing market, whereas hardware will account for the remaining XX% market share. During the forecast period, the cumulative global expenditure on military IT, data, and computing is expected to reach US\$XX billion.

The chart below shows the expected military IT, data and computing market value during 2014–2024:



The Global Military IT, Data and Computing Market 2014–2024

1.2 Global Military IT, Data and Computing Market – Regional Analysis

1.2.1 North America to drive the demand for the military IT, data & computing market over the forecast period

The North American region is the forerunner in global military expenditure, as well as technical development and utilization. Similarly, the region generates the highest demand for the military information technology, data, and computing market across the world, due to the enormous consumption levels of the US military. Canada, the only other country in the region, lags much behind the country in consumption of military IT, making the region’s market majorly dependent on the US. With a view on future network centric warfare, the US has been investing significantly on acquiring and deploying advanced IT infrastructure such as Enterprise Resource Planning (ERP) software products, Tactical Local Area Network (TACLAN) Family of Systems, Software support for Radars, Net-centric networking products, the transition to cloud computing, and cyber security over the last few years. Complemented by Canada’s military IT expenditure, the US military has been driving the North American region’s military IT, data, and computing market, which is valued at US\$XX billion, and accounts for XX% of the world’s total military IT, data, and computing market in 2014. Over the forecast period, the North American market is projected to grow at a CAGR of XX%, to reach US\$XX billion by 2024, primarily due to programs such as Defense Information System Network (DISN), Warfighter Information Network Tactical (WIN-T), Next Generation Enterprise Network (NGEN), Consolidated Afloat Networks & Enterprise Services (CANES), and Global Combat Support Systems (GCSS) among others.

The table below gives a brief overview of the global military IT, data and computing market

Table 1: Global Military IT, Data and Computing Market Overview				
Region	Market in 2014	Market in 2024	Total Market (2014–2024)	Annualized growth/decline (2014–2024)
North America	US\$XX billion	US\$XX billion	US\$XX billion	XX%
Asia-Pacific	US\$XX billion	US\$XX billion	US\$XX billion	XX%
Europe	US\$XX billion	US\$XX billion	US\$XX billion	XX%
Middle East	US\$XX billion	US\$XX billion	US\$XX billion	XX%
Latin America	US\$XX billion	US\$XX billion	US\$XX billion	XX%
Africa	US\$XX million	US\$XX million	US\$XX billion	XX%
Total military IT, Data and Computing Market	US\$XX billion	US\$XX billion	US\$XX billion	XX%
Source: SDI analysis				© SDI

The Global Military IT, Data and Computing Market 2014–2024

1.3 Military IT, Data and Computing Sub-Sector Market Size Composition

1.3.1 Networking segment to account for the highest expenditure in the military IT, data and computing market

The demand for networking products and services is expected to be driven by the need to transform the existing military into a fully network-centric force in top defense spending nations, such as the US and the UK, and in fast growing defense markets, such as China, India and Brazil. This move is catalyzed by the experience gained by military forces in countries such as France and Australia while working in close collaboration with the US and UK militaries in international missions. Furthermore, this experience has enabled respective countries to pinpoint areas of improvement, including the requirement for a network centric capability. Subsequently other western nations and some developing countries, such as India and China, have shown interest in developing a networking centric force for their own armed force units.

The integration of the existing isolated communication network to achieve the goal of a network-centric force is also expected to drive the demand in some countries. The US will lead expenditure in this sector during the forecast period and has formulated a number of plans to integrate its defense infrastructure. The UK and Germany are also expected to spend substantial sums on this segment throughout the forecast period. The market for the networking segment is expected to attract an expenditure of US\$XX billion in 2014, which is projected to grow at a CAGR of XX% to reach US\$XX billion in 2024. The cumulative market for networking during the forecast period is expected to register a value of US\$XX billion.

The table below gives a brief overview of the global military IT, data and computing market:

Table 2: Global Military IT, Data and Computing Market Overview				
Category	Market in 2014	Market in 2024	Total Market (2014–2024)	Annualized growth/decline (2014–2024)
Networking	US\$ XX billion	US\$ XX billion	US\$ XX billion	XX%
Cyber security	US\$ XX billion	US\$ XX billion	US\$ XX billion	XX%
Software	US\$ XX billion	US\$ XX billion	US\$ XX billion	XX%
Hardware	US\$ XX billion	US\$ XX billion	US\$ XX billion	XX%
Total Military IT, Data and Computing Market	US\$XX billion	US\$XX billion	US\$XX billion	XX%
Source: SDI analysis				© SDI