Worldwide Airborne Surveillance Intelligence and Reconnaissance: How will your business access this critical and lucrative market?

$20 billion+
Global ISR Market Forecast 2014 – 2024

“Very useful and very very helpful... a great opportunity to meet people and share ideas”
Vice Admiral Rinaldo Veri, Commander Allied Command Naples, NATO HQ. Maritime Reconnaissance and Surveillance 2012
Defence IQ prides itself on offering international professionals the rare opportunity to meet the right people responsible for major programmes within the growing global airborne Intelligence, Surveillance and Reconnaissance community. These leading individuals offer a frank and honest insight into current priorities and future requirements.

The airborne ISR sector is vast and includes numerous different mission sets and requirements. That’s why we have consulted our military and industry advisory boards to offer a distinct portfolio of events dedicated to covering each key aspect of the market in depth. By focusing on specific subjects at each event, we ensure that the military and governmental representatives in attendance are the decision makers for that specific area. This delivers the most relevant and receptive audience for your specific solutions; it makes the face-to-face interaction immediately more comfortable as you are both on the same page.

In addition, our events cater for business professionals who want valuable face to face interactions with existing and new clients. In fact, we make it a point to encourage one-on-one conversations during networking breaks and small group discussions through our interactive round table discussions. It’s an approach we feel adds substantially more value than the hustle and bustle of huge exhibitions, where you don’t meet the critical decision makers.

If you’re looking to introduce your product, grow your brand, or maintain your client relations within the airborne ISR market, then you will certainly benefit from joining us at one of our tailored airborne surveillance events.

Over the past decade, Defence IQ has been proud to work with the highest levels of the global ISR market to ensure the most significant contribution and participation in our events. Our team strives to maintain this valuable relationship with the community, ensuring that we stay close to the real issues and solutions being discussed.

Through regular face-to-face meetings, as well as frequent phone engagement, we are able to design the most relevant and rewarding programmes for the community. In 2013 we introduced our first military advisory boards in order to continue to develop and deliver the most contemporary and timely content.

In September 2013, we were honoured to work in partnership with the Italian Navy to deliver the Maritime Reconnaissance and Surveillance conference, as part of their illustrious 100 year anniversary of Naval Aviation. This level of mutual trust and collaboration means that we can offer the global ISR community a highly lucrative platform, which acts as a conduit to learning, information-sharing, debate and networking.

But don’t just take our word for it. Take a look at our events over the coming pages to discover just some of the senior figures who have taken time out of their busy schedules to deliver personal support at some of our recent events.

A Proven and Valued Partnership: Defence IQ’s Collaboration with the Global ISR Community

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Global ISR Market Overview

The global market for airborne intelligence, surveillance and reconnaissance (ISR) platforms and payloads is thriving, with recent assessments pegging its latest value at close to $20 billion and forecasts of up to $43 billion by 2020. Providing a high-end, versatile capability that offers broad situational awareness, airborne ISR is the force multiplier that no modern military can be without – and recognition of this fact has led to a race for information superiority in the sky.

The market comprises a range of vital systems from maritime patrol aircraft to AEW&C aircraft and UAVs, all of which are seeing strong acquisition across every major region. The recent campaigns in Afghanistan, Iraq and Libya have proven that forces now rely on all of these specialised aircraft to carry out efficient and successful missions, from countering insurgent activity, protecting local populations and identifying potential threats from land, air or sea. Civil ISR spending is also on the rise, lending further weight to the prospects of this expanding market.

Given the widespread race for intelligence provided by airborne platforms, the integration and interoperability of these systems is of course playing a major focal point for the future of joint force operations. With many nations prioritising the need to share information and ISR resources with partners and allies, new opportunities for commercial providers have come into play in line with the range of new challenges inherent to the rapid advance of technology.

Global Outlook

The Middle East is shaping up to be a hub for the intelligence aircraft market over the next decade as the Gulf Cooperation Council (GCC) members seek to buy AEW aircraft and with the US looks to establish a Centre of Excellence in the region. Turkey’s modernisation has seen it join the ranks of those able to deploy an advanced AEW&C capability, while Saudi Arabia, the UAE and Oman are just three of the significant countries contemplating upgrades and further options on unmanned surveillance and early warning aircraft.

European nations are very much concerned with the potential of unmanned ISR, seeing potential cost savings in more numerous remote systems as ISAF forces return home to reassess the needs of tomorrow. The relatively permissive environment of Afghanistan is unlikely to reflect future campaigns, which may instead propose a battlespace featuring anti-access, area-denial systems (A2/AD), a risk to manned, low-altitude aircraft. The United States is likewise doing what it can today to better the likelihood of stealth and collaboration with its international partners, along with tackling the challenges of mass data fusion and storage.

French and UK eyes in the sky have also seen success in Mali, and with a number of emerging conflicts in Africa coming to the fore, peacekeeping forces are turning to these resources to stay on top of militant activity. Armed Forces from Nigeria to Kenya are also deploying their own ISR assets to curb other deep-rooted problems from poaching to drug trafficking, demonstrating a burgeoning ground for sales.

Across Asia and the Pacific, the need for huge area coverage coupled with border security and defence zone concerns have led to a string of heavy investments, with the likes of India considering further expenditure on brand new aircraft, and the likes of China, Japan and Republic of Korea all announcing upgrades to unmanned and AEW&C systems, owing to heightened territorial tensions in the South and East China Seas: Smaller nations within this region, including Vietnam, Singapore and Indonesia, have also seen fit to pursue the acquisition of new ISR assets. Further South, Australia has been readying its new fleet of Wedgetails, promising to offer one of the finest systems in the world.

Developments in South America include Brazil’s sweeping modernisation efforts extending to the airborne space, placing emphasis to the tune of hundreds of millions of dollars to AEW upgrades as a key component to expanding the operational capacity of the air force. Surveillance aircraft are said to have been invaluable in the fight against drug-trafficking, proving to be a potential game-changer in Colombia, Mexico and the Dominican Republic.

The Arctic is also a slowly but steadily emerging opportunity for the ISR industry, with nations invested in the region announcing key budget allocations. The protection of natural resources and the at-risk environment, together we a distinct lack of recent investment into state-of-the-art systems capable of operating in such a large and unforgiving area, all point to the fact that improvements will soon be made.
As our flagship ISR event, Airborne ISR and C2 Battle Management, unites the global ISR and AEW communities to address the current and future requirements for developing complete domain awareness. As AEW and ISR assets are increasingly operated in tandem, this is the only event in Europe to bring together both communities to tackle the current and future requirements for delivering a more integrated and effective joint ISR force element. Under the Chairmanship of Matt Roper, Head of the Joint ISR initiative at NATO’s NCIA, 2014’s ground-breaking forum brought together over 30 speakers from 20+ nations offering a unique opportunity for high-level networking with leading program managers and decision makers from around the world. With Matt Roper’s continued Chairmanship, the 2015 event is set to grow to unprecedented levels.

2014’s Keynote Briefings Included

- General Rabbah Aggad, Inspector General, Algerian Air Force
- Lieutenant General Michael T. Flynn, Director, Defence Intelligence Agency of the United States
- Air Vice Marshal Philip Osborne, Director of Capability, Joint Force Command, UK MoD
- Air Commodore Jeff Portlock, ISTAR Force Commander, RAF Waddington, Royal Air Force

Why Airborne ISR and C2 Battle Management?

- The only combined ISR and AEW forum in Europe: maximise your understanding of the challenges presented by the move towards a joint-ISR community whilst raising the awareness of your solutions in both sides of the market
- Manned vs. Unmanned: an opportunity to join leading military figures in the debate over the required mix of manned and unmanned assets for airborne operations. Can we ever picture a fleet of purely unmanned assets or will manned ISR platforms always have a vital role to play?
- A truly global forum: with representatives from across Europe, North America, the Middle East, Africa, Asia and Australia this truly is a unique opportunity to network one-to-one with decision makers from target nations and new nations to deliver your business case away from the hustle and bustle of a trade-show setting.

Who Attends Our ISR Events?

**Military**
- Algerian Air Force
- Brazilian Air Force
- Chilean Air Force
- European Space Agency
- French Navy
- German Ministry of Defense
- Guardia Di Finanza
- Icelandic Coast Guard
- Italian Army Aviation
- Italian Coast Guard
- Italian MoD

**Industry**
- Airbus Military
- Aerodata AG
- Agusta Westland
- Alenia Aermacchi S.p.A.
- ARINC
- Asseco Poland SA
- BAE Systems
- Böing
- Bombardier Aerospace
- Cassidian
- Copernicus Technology Ltd
- Directflight Ltd.
- EADS Deutschland GmbH
- Elbit Systems
- Electronics
- ENVIATA Ltd.
- exactEarth Ltd
- Field Aviation Company Inc.
- FLIR Systems
- General Atomics Systems Integration LLC
- Gulfstream
- IAI Elta Systems
- Indra Sistemas
- Japan Manned Space Systems Corporation
- L3 Communications
- L3 Helisys
- Luciad NAV
- Marshall Aerospace Ltd.
- MDA Systems Ltd.
- NHI Industries
- Northrup Grumman
- OoDS
- OPTIMARE Systems GmbH
- Raytheon UK
- Saab
- Saiger
- Saitek ES
- SISC Airborne Systems
- Swedish Space Corporation
- Thales

**Who Attends Our ISR Events?**

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The maritime domain offers a unique challenge for airborne surveillance and reconnaissance. From wide-area surveillance through to anti-piracy and drug interdiction operations, delivering effective surveillance of the maritime domain has become paramount to ensuring national security. Defence IQ's Maritime Reconnaissance and Surveillance event has been the leading European forum for this subject for over a decade. Each year over 100 leading maritime professionals gather to debate a whole range of critical issues from the cutting edge questions over satellite based maritime surveillance and the MPA debate through to long-term considerations such as data fusion and dissemination.

Such is the prestige of the event that in 2013 we were honoured to partner with the Italian Navy, hosting the event in Rome in association with their illustrious celebration of the 100th anniversary of Italian Naval Aviation. As the focus on the maritime domain intensifies, Maritime Reconnaissance and Surveillance is set to go from strength to strength.

Keynote Briefings have included:
- Vice Admiral Rinaldo Veri, Commander Allied Command Naples, NATO HQ
- First Admiral Maritime Dato Che Hassan Bin Jusoh, Director of Enforcement and Exercise, Malaysian Maritime Enforcement Agency
- Rear Admiral Sean Buck, Commander, Patrol and Reconnaissance Group, United States Navy
- Rear Admiral Jesus C Millan, Chief of Staff, Philippines Navy
- Brigadier General Wiseman Mbambo, Director of Air Capabilities and Plans, South African Air Force
- Air Commodore UD Atiku, Naval Aviation officer, Nigerian Air Force

Here’s what the community had to say about Maritime Reconnaissance and Surveillance 2013:

“The event was outstanding”
Pablo Benjumeda Herreros, INAER

www.maritimerecon.com
With the level of active investment in the global ISR market reaching $20 billion over the next decade, and with the number of key ‘active’ programs - each at different development stages – Defence IQ’s ISR event portfolio meets the need for specifically structured environments to create high level interaction between the ISR Programme Managers and their key partners and suppliers. Sponsorship provides industry with the opportunity to forge relationships in the sector, which will drive this market forward, and help advance some of the most important ISR programmes from all over the world.

Position your Company Brand and Demonstrate Thought Leadership to the Community
Defence IQ’s ISR events have a strong tradition of showcasing leading technologies and thought leadership from the key solution providers in the sector. Through an integrated mixture of exhibition stands, branding and/or presentations, you’re able to get across your message in the most effective way possible. Some of the leading defence companies who have already taken advantage of our ISR portfolio to enhance their business development include Northrop Grumman, Raytheon, Lockheed Martin, Boeing, Saab, and BAE Systems.

Launch New Solutions or Services
Defence IQ’s ISR events have always provided the ideal environment to launch and promote the latest products or systems. With the most senior figures from the industry in attendance, plus carefully selected media and press onsite, pioneering new technology will always generate significant interest onsite.

Experience The Dual Benefits of an Integrated Conference and Exhibition
We know what it’s like seeing stand after stand of products, or trying to showcase your technology to a large crowd within the trade show format. So often, a ground-breaking innovation or that vital sense of urgency to find new solutions is forgotten or missed as exhibition fatigue sets in. With Defence IQ’s ISR event portfolio, we believe the solution is in “targeted viewing” using the conferences as a means to define the urgent operational and market requirements, and then allowing our senior military, industry and R&D representatives to assess a tailored range of solutions to those requirements in the exhibition area. The only select the market leading solution providers to align their business with our events.

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In bringing together decision makers from the ISR community as well as the key programme managers deciding on specific requirements, all of whom have strong business reasons for attending the event, we can ensure a much greater impact for your solution working to achieve higher conversion rate for investment.
Defence IQ is an authoritative news source for high quality and exclusive commentary and analysis on global defence and military-related topics. Sourcing interviews and insights directly from senior military and industry professionals on air defence, cyber warfare, armoured vehicles, naval defence, land defence and many more topics, Defence IQ is a unique multimedia platform to discuss and learn about the latest developments within the defence sector.

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**Start knowledge sharing and networking before the event**

- Follow us on Twitter @DefenceIQ
- Join the Defence IQ LinkedIn community

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