

Military Software Defined and Cognitive Radio Market Overview

SDR10

Wireless Innovation Conference
2 December, 2010

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Software Defined and Cognitive Radio Assessing the Military Market



SDR and CR Market Overview

Market Drivers and Restraints, Industry Challenges

Market Trends and Opportunities

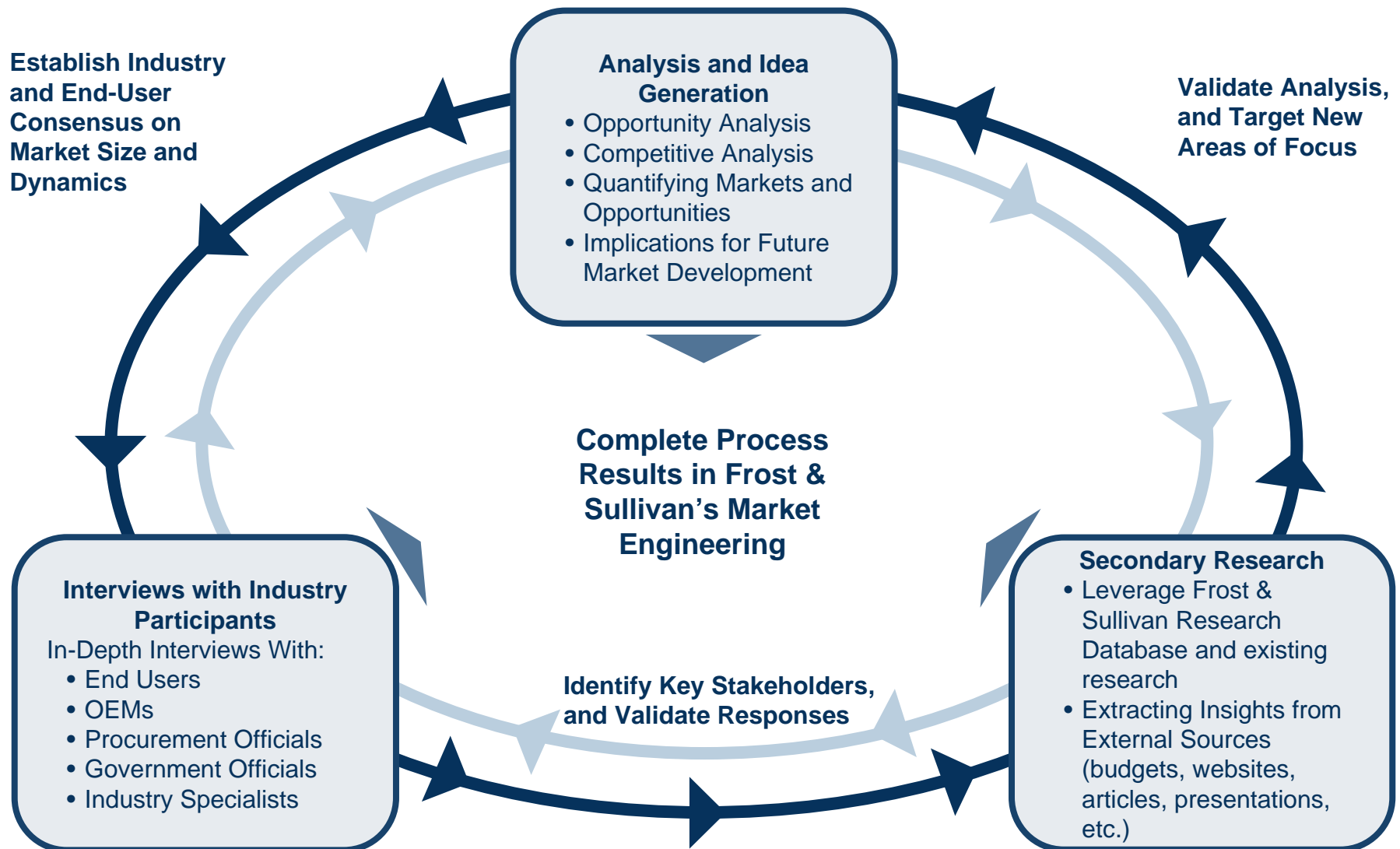
SDR and CR Technology and Operational Trends

Military Funding

Market Attractiveness and Competitive Environment

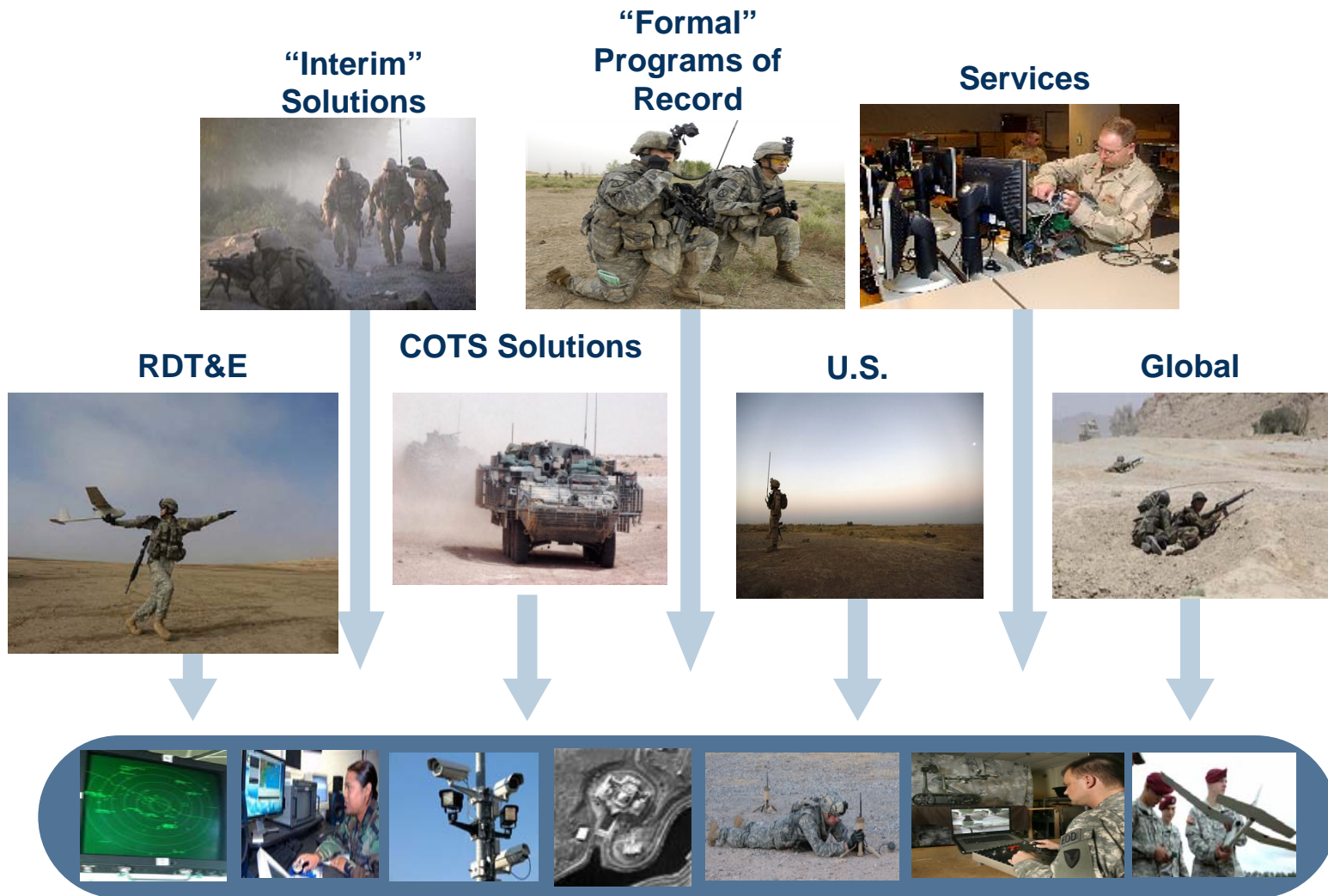
Future Outlook and Strategies

Frost & Sullivan's Proven Methodology

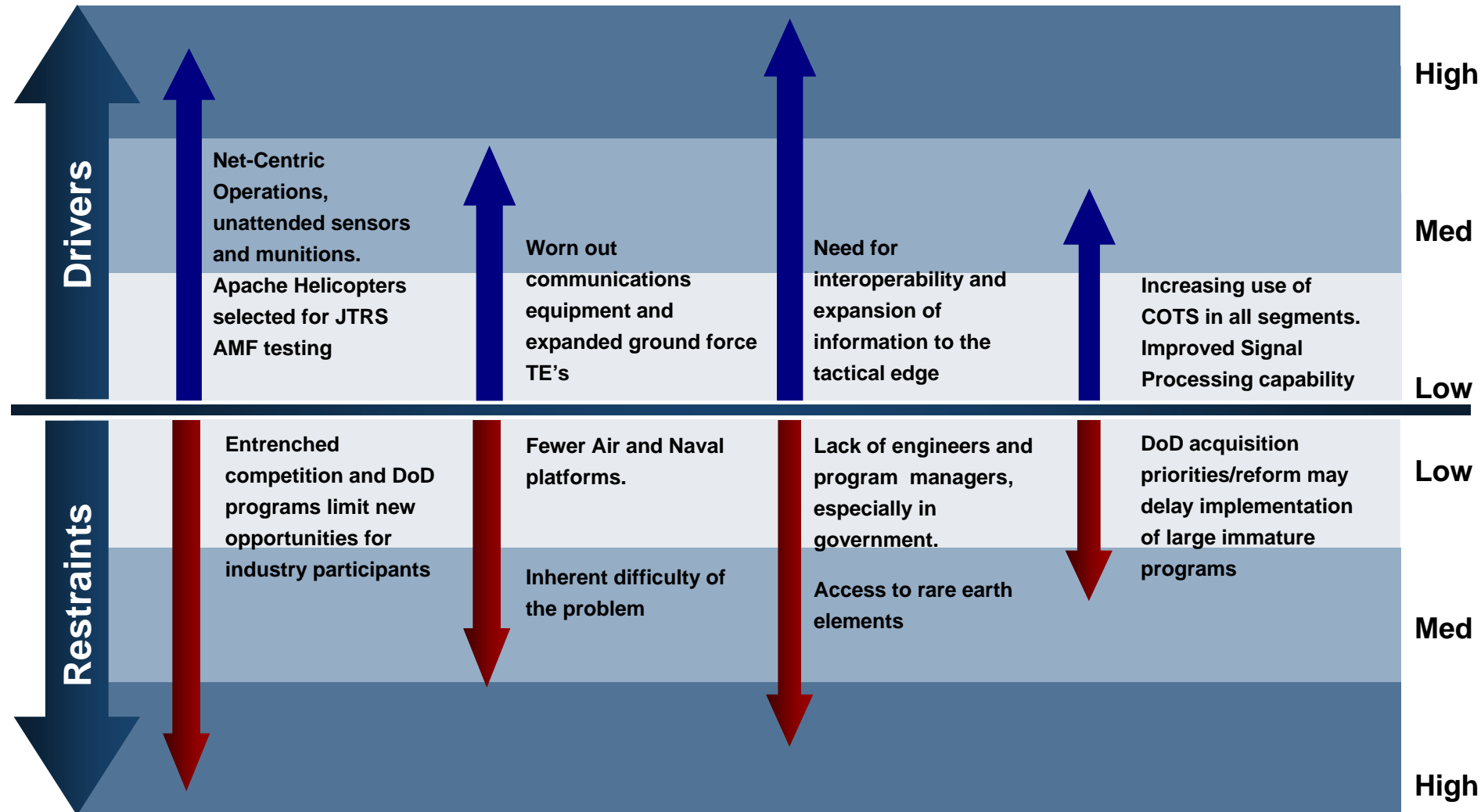


Overview

Military communications programs are divided into segments to aid analysis

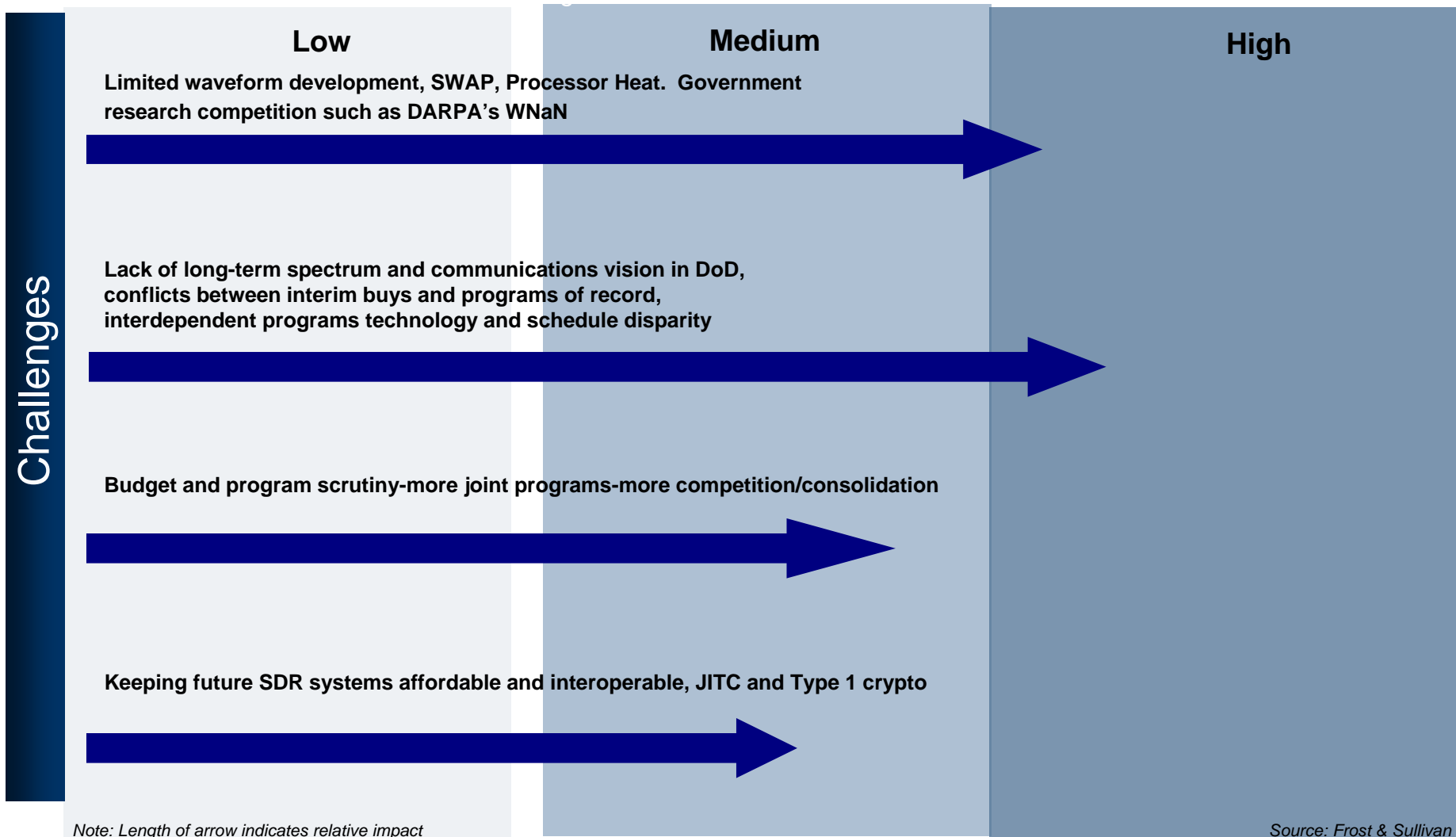


Market Drivers and Restraints

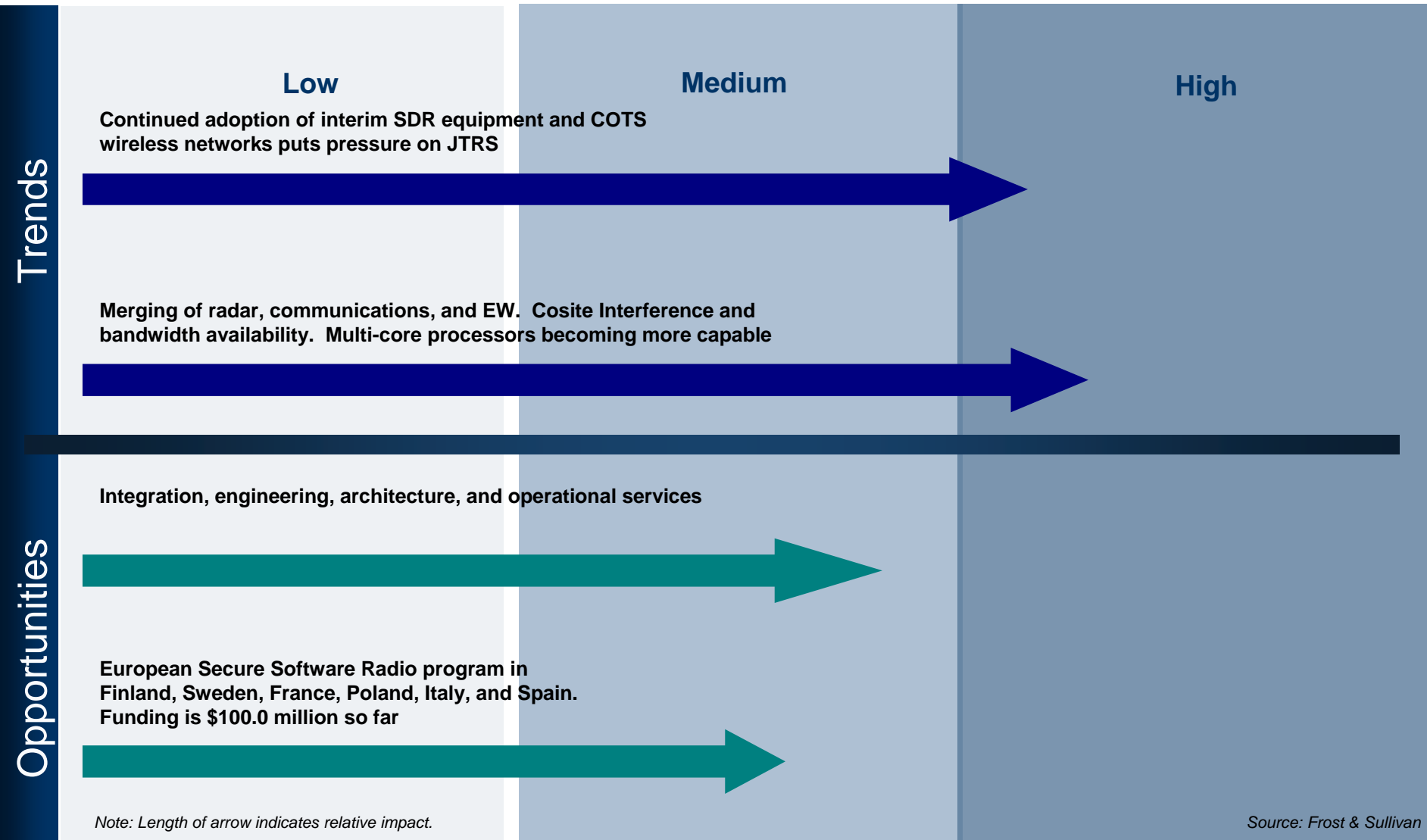


Source: Frost & Sullivan

Industry Challenges

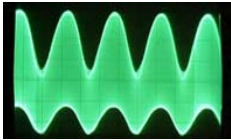


Trends and Opportunities



Military SDR Technology and Operational Trends

Interoperability



- NATO is in the process of specifying network architectures such as the U.S. SCA, SCIP, and HAIPE standards to enable multi-national interoperability while maintaining security. Transition to IP based architectures is a key development
- “Cloud” Computing-based Service Oriented Architectures. Fewer space assets, every soldier and weapon a sensor and communications platform using multi-function devices, including GPS and BFT

SDR



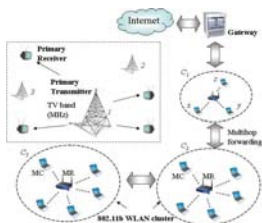
- SDR is being successfully applied in Unmanned Aerial Vehicle COMINT receivers, Counter IED devices, Airborne Radar Countermeasures to name a few
- Other market areas include Public Radio Wave Form, Law Enforcement, and Homeland Security
- The VPX open standard form factor Marketing Alliance is a driving force in the expansion of SDR in the U.S. and global defense industries

MANET



- Force distribution is generating a requirement for Mobile Ad-hoc Networks to enable persistent communications and command and control in lower force echelons. Seamless software-defined radio and the ability to “pull” information as needed. Small form factor radio sets with embedded crypto are growing the fastest

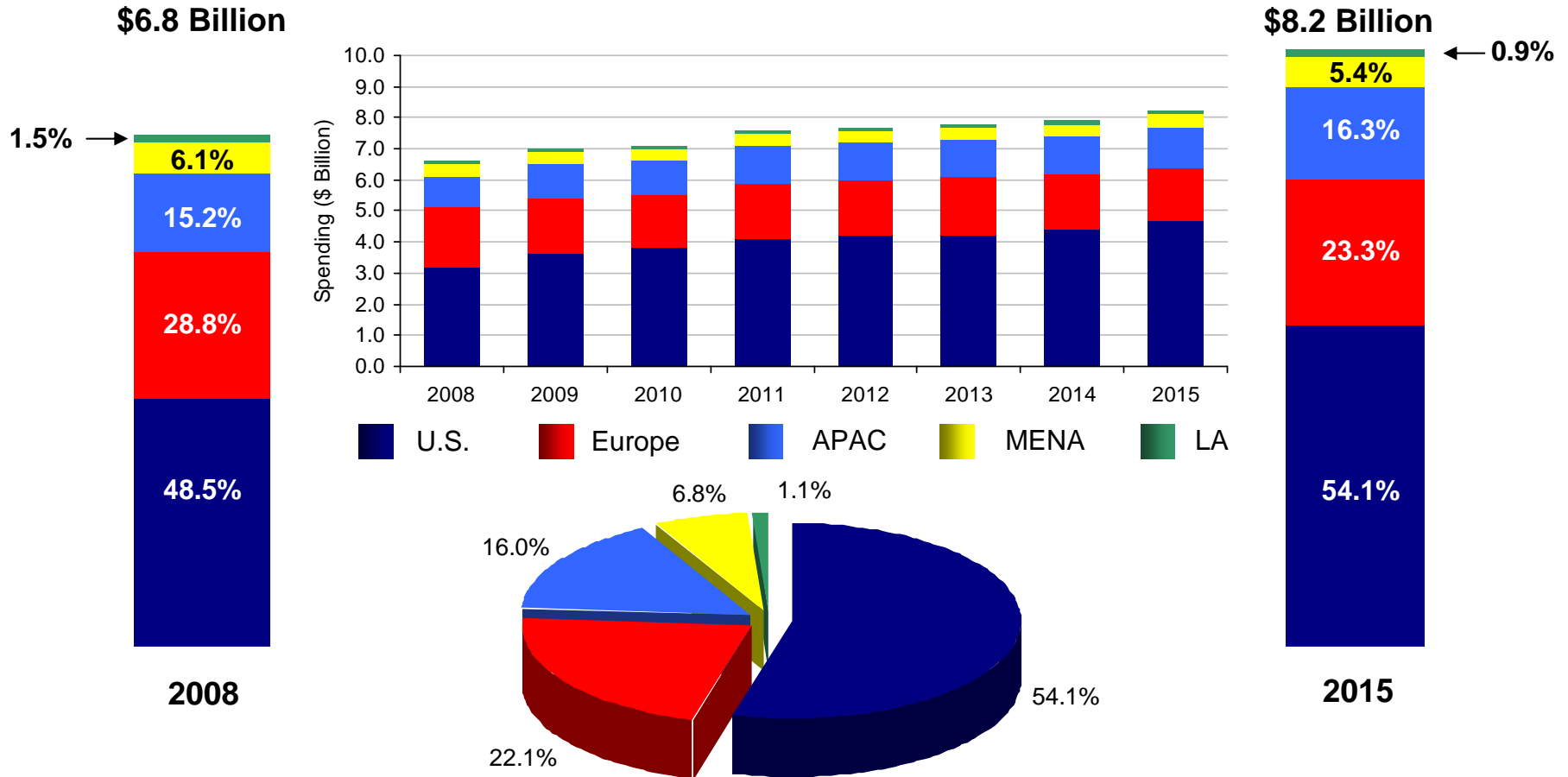
Cognitive Radio



- An experimental radio technology could provide U.S. warfighters with assured access to voice, data and video communications. The prototype systems use an advanced wireless networking capability to link troops with larger networks such as the GIG. The radios also are capable of sensing the electromagnetic environment and selecting frequencies that are not in use automatically
- Anticipated to follow incrementally as SDR and ad hoc networks mature
- VPX form factor is ready to support cognitive radio development

Global Military SDR Funding

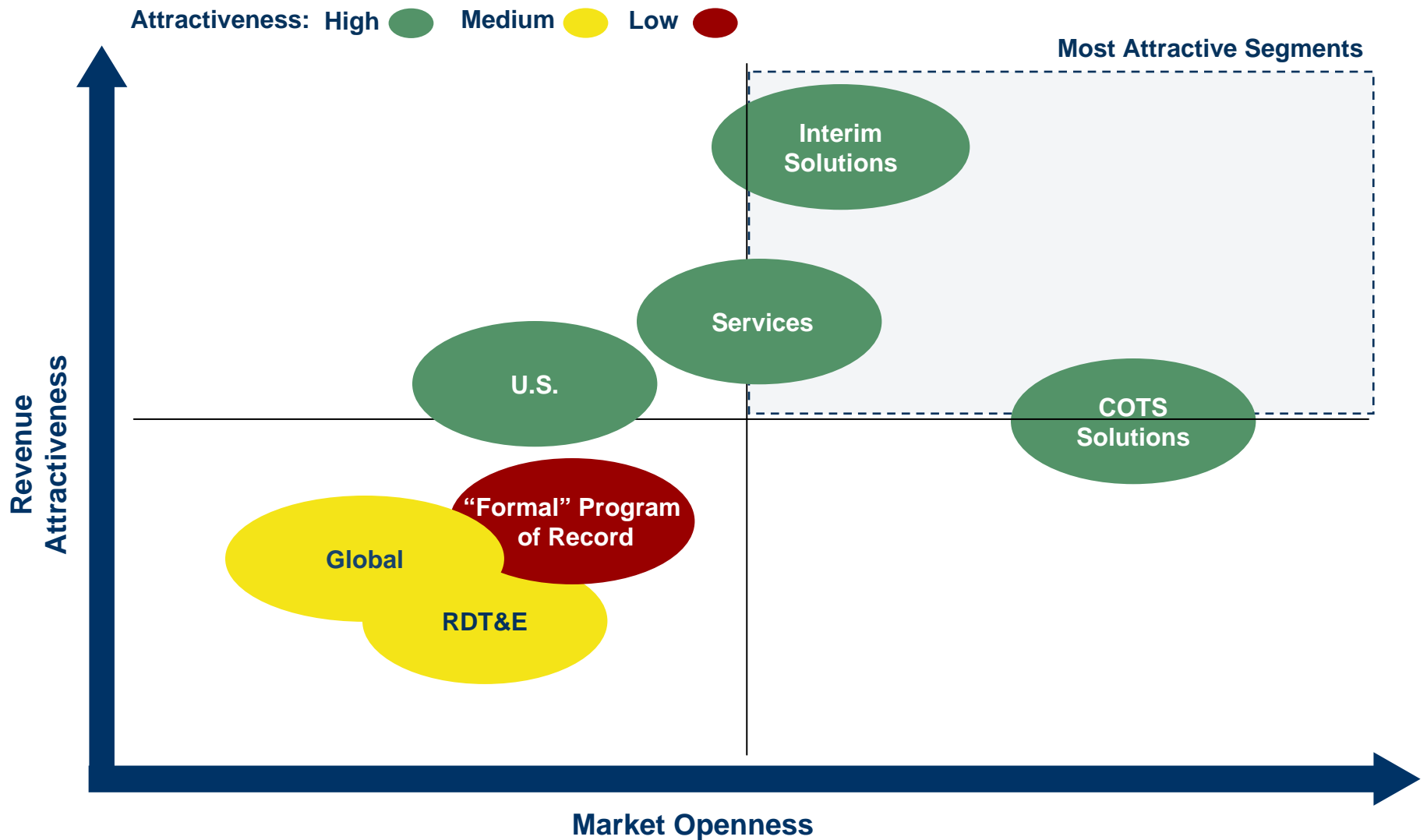
DoD Software Defined Radio Market (U.S.), 2008-2015



The global software defined and cognitive radio market will remain stable with the U.S. continuing to be the primary developer and purchaser

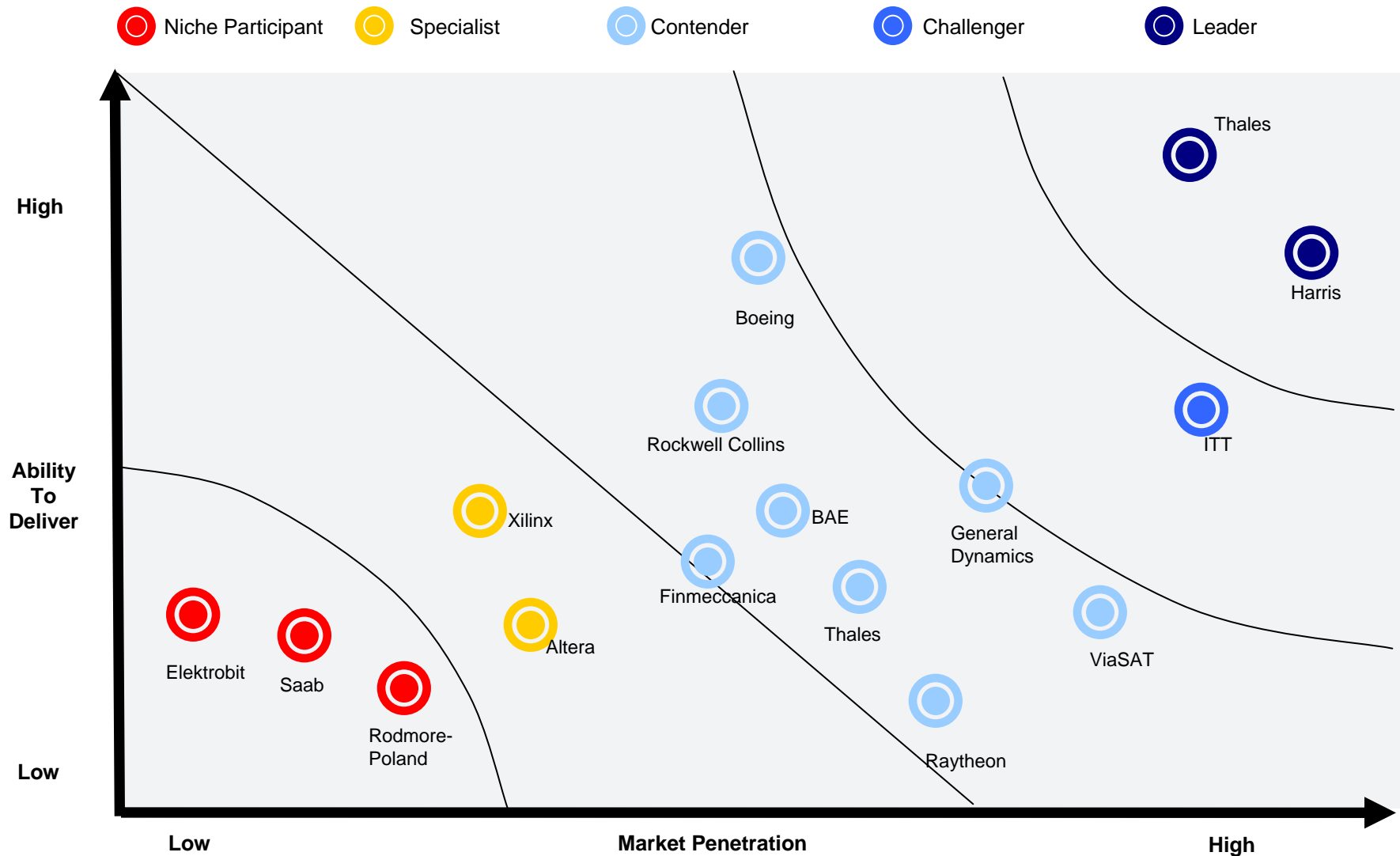
Source: Frost & Sullivan

SDR Market Attractiveness Grid

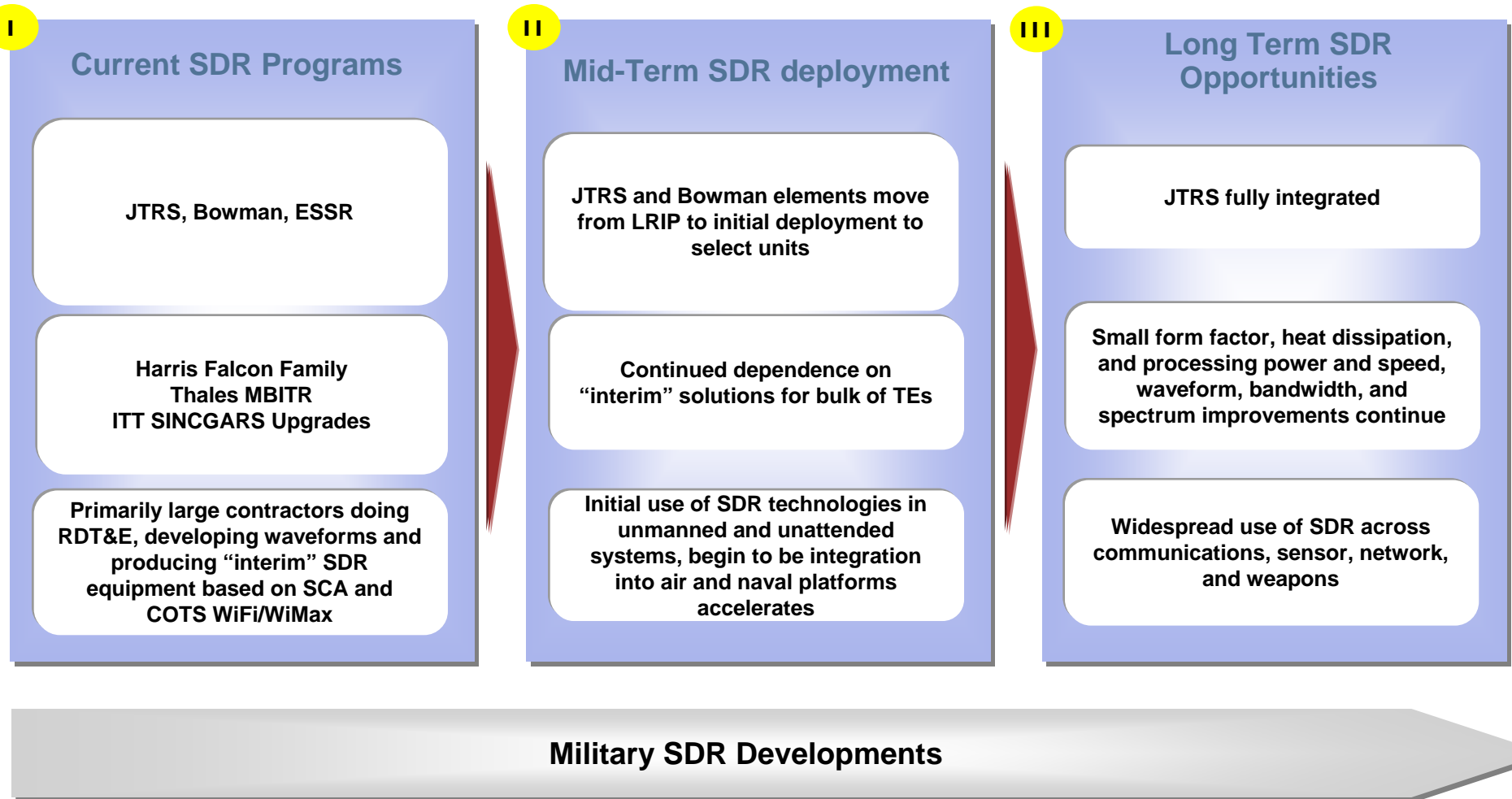


Source: Frost & Sullivan

Military SDR Competitive Environment



SDR Programs Future Outlook



Strategies



For Additional Information

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