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IMDEX 2013: Asia sees unmanned market worth

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With UAVs entering the forefront of Asian militaries' thinking, the potential market over the next ten years for ship-based tactical UAVs is predicted to fetch some \$3 billion.

Bob Nugent, VP of advisory services at AMI International, told *Shephard* that the Asia-Pacific market potential for ship-based aerial platforms, both manned and unmanned, is \$10 billion over this timeframe, with UAVs expecting to factor for almost a third of it. Unmanned platforms include VTOL systems such as the Camcopter and Fire Scout, as well as fixed-wing vehicles such as Aerosonde and ScanEagle. The smaller nature of these examples fit into local requirements calling for UAVs to be operated off the increasing amount of corvettes, OPVs and frigates being procured in the region.

He said that militaries in the region are 'keeping pace' as the technology matures, and unmanned platforms are gradually becoming programmes of record alongside their manned counterparts.

'This "new normalcy" will help unmanned systems be further accepted as valuable capabilities rather than exotic curiosities,' Nugent explained.

However, he added that many military systems being introduced within the region are still at test and trial stage, while some systems are operational but in a civilian capacity with ministries of interior, forestry, emergency services and research institutes.

'I will say with confidence that every country in the Asia-Pacific region is actively engaged in some sort of unmanned system development or operation, and the numbers of operational unmanned systems in the region will continue to grow at a sustained and steady pace.'

Nugent used India as an example of a nation in the region that has advanced its approach to unmanned technology, investing in land-based UAVs that augment manned maritime patrol aircraft.

Meanwhile, Australia has advanced in its UAV development through its Aerosonde business, the Republic of Korea has tested maritime UAVs from Europe as well as having indigenous ventures in mind, and Singapore has combined foreign USVs such as Rafael's Protector with its own systems developed by ST Technologies.

Aside from UAVs, unmanned maritime vehicles are also a hot topic in the region, which could be integrated into new manned vessel programmes, particularly in mine warfare: 'This would involve something like the US LCS [Littoral Combat Ship] mission package concept for mine warfare in which unmanned surface vessels serve as the host platform for mine warfare sensors and counters- to include UAVs,' Nugent added.

The US Navy's USS Freedom was highlighted at the IMDEX exhibition after its deployment to the region in April, and Nugent said that this was significant because it relies on unmanned vehicles in many of its mission packages.

UUVs are also of importance to the area, particularly ones that take on a torpedo form factor so that they can be launched and recovered from conventional torpedo tubes on submarines. Nugent said that this kind of operation means that the UUV can operate at ranges and depths that minimise risk of detection or damage to the submarine it's operating from.

Schiebel showcased its Camcopter UAV for the first time at the show, which is operated by three undisclosed navies in the region.

'There is no ship without a radar...and there should be none without a UAV,' Hans Georg Schiebel, MD of the company, explained to *Shephard*. 'There is no recession for UAVs. Although there are austerity measures underway in many countries...there isn't when it comes to UAVs.'

The company works with ship-building primes to ensure ease of integration onto vessels, and is also operated by commercial customers in the region, with 140 systems operated in total worldwide.

As ship procurement proliferates in the region, Schiebel predicted that all vessels will have some sort of beyond line of sight capability, which a UAV is suited for.