

RQ-7 and U.S. Army Tactical UAS



Requirements, Scenarios and Outlook

February 2010

Executive Summary



Market Analysis

Structure and Purpose

This report takes a critical look at U.S. Army Tactical Unmanned Aerial Systems through the lens of RQ-7 and a potential larger, rotary-wing UAS to fill the void left with the cancellation of the Future Combat Systems Class IV UAS.

The research presents acquisition scenarios that are likely to occur given high-operations tempo, criticality of the unmanned tactical ISR mission and an assumed ongoing emphasis on irregular warfare/counterinsurgency. The three acquisition forecasts range from 2013 to 2025

G2 Solutions initiated this project as a result of multiple, independent and unsolicited industry questions pertaining to the future of U.S. Army TUAS. Scenarios were built with inputs from U.S. DoD Roadmaps, the 2010 Quadrennial Defense Review, stated program acquisition and lifecycle plans as well as multiple inputs from industry



Executive Briefing

Market Findings

- G2 Solutions believes that within this forecast Army will require a tactical UAV with payload, range and endurance greater than what RQ-7 or system enhancements will be able to provide.
- Manned and unmanned teaming within the Army ISR enterprise is essentially a proven commodity and capability; what remains at issue is the mix and formation of forces required to execute the Find, Fix and Finish functions.
- Weaponization of tactical UAVs is a major cost driver, and one that also impacts concepts of operation (CONOPS) and doctrine. Is the resultant capability worth the cost to prosecute time-sensitive targets with a minimum of massed firepower?

Key Figures

- A combination of the two most expansive acquisition scenarios would total \$2.6 billion in UAS revenues through 2025
- An RQ-7 replacement/recapitalization and an Army rotary-wing UAS Full Operational Capability would bring in excess of 400 UAVs into service between 2013 and 2025
- In all scenarios, acquisition will peak in the 2018-2020 timeframe, with roughly \$1 billion in acquisition revenues.

Near Term Outlook

- Operations tempo and an increasing thirst for tactical persistent intelligence, surveillance and reconnaissance (ISR) are placing tactical unmanned systems at the forefront of mission prosecution
- Army's cancellation of the Future Combat Systems Class IV UAS, and resultant increasing importance of the RQ-7 UAS place added emphasis on this system
- This report provides three separate acquisition scenarios for U.S. Army Tactical Unmanned Aerial Systems.

RQ-7/Army TUAS Scenarios: All Scenario Revenues Over Time (2013-2025)

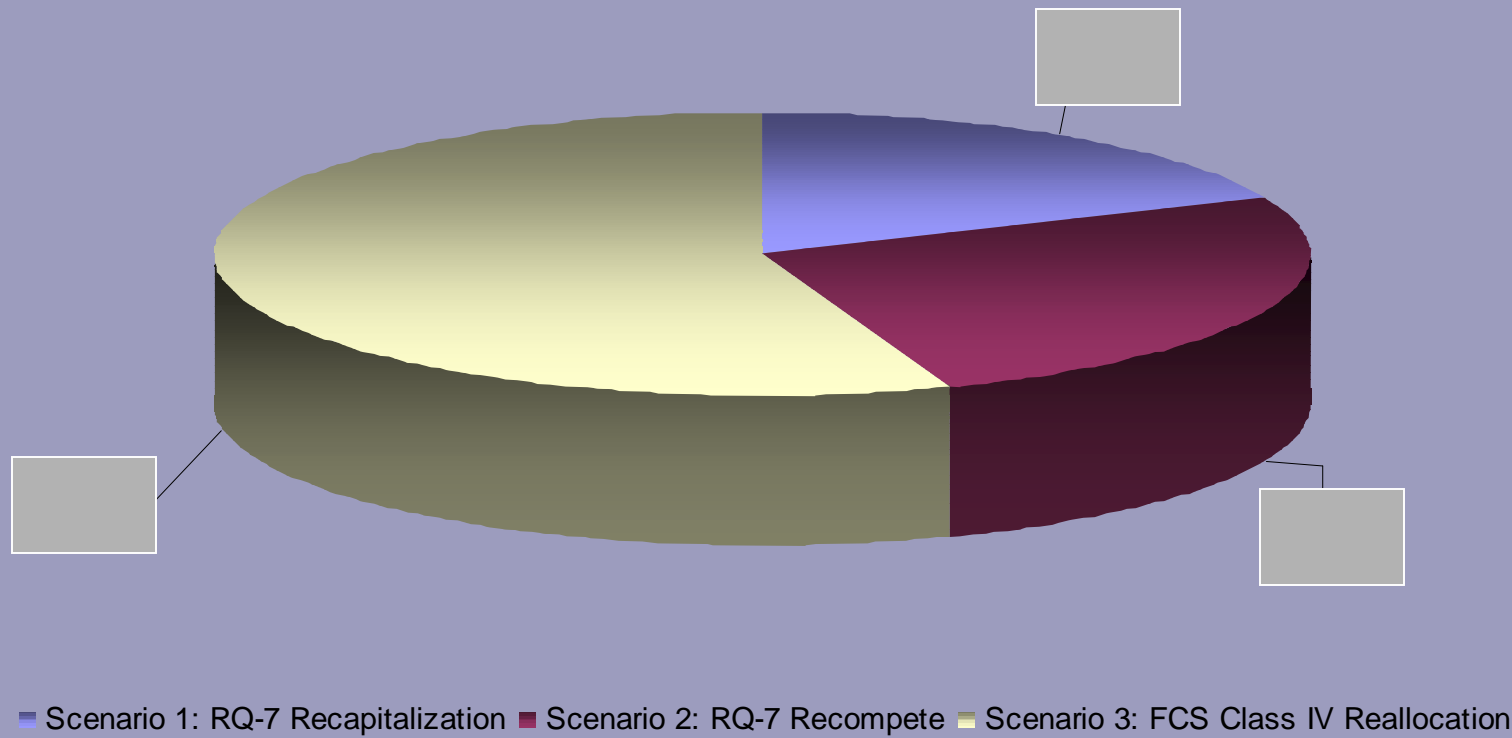


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