Air-Sea Battle

Concepts, Key Programs and Forecast

G2 Solutions Aerospace & Defense Research Note
January 2012

Executive Summary

Air-Sea Battle: Report Parameters and Goals

This report is an effort to quantify – **from a U.S. DoD budget perspective** – the likely effects, program, and capability prioritizations brought about by the Air-Sea Battle Concept over time.

G2 Solutions analyzed the USN and USAF FY 2012 procurement and RDT&E budget documents through the Air-Sea Battle lens. **157 Programs and/or Program Elements were selected for inclusion based upon the increased importance** their capabilities will bring to an aggregate Air-Sea Battle capability.

These programs were broken down into application domains: Aircraft, Munitions, Space, Naval, Communications, Collection and EW and Propulsion and Directed Energy.

G2 Solutions included programs and programs elements with revenues deemed significant over time that are also important to Air-Sea Battle capability.

Programs deemed to remain unchanged through Air-Sea Battle were not included in the analysis.

Air-Sea Battle: Origins and Description,
November 2011, all content Air-Sea Battle Office

- Secretary of Defense Panetta directed the Department of the Air Force and the DoN to develop an Air-Sea Battle Concept. The services designed an operational concept, focused on ways and means necessary to ***neutralize A2/AD threats***, to ensure our ***Joint force maintains the ability to project power and protect*** U.S. national interests.

- The Air-Sea Battle Concept centers on networked, integrated, attack-in-depth to disrupt, destroy and defeat (NIA-D3) A2/AD threats. This exploits and improves upon the U.S. advantage across air, maritime, land, space and cyberspace domains, and is essential to defeat increasingly capable intelligence gathering and weapons systems used by adversaries employing A2/AD.

- Air-Sea Battle is a limited operational concept designed to address an adversary's A2/AD capabilities. It is not aimed at any particular potential adversary, nor a campaign plan designed to accomplish a specific national objective.

Air-Sea Battle Spending Analysis

Referenced and Reviewed Justification Documents

- USAF Aircraft Procurement FY 2012 Volume 1
- USAF Aircraft Procurement FY 2012 Volume 2
- USAF Missile Procurement FY 2012
- USAF RDT&E FY 2012 Volume 1
- USAF RDT&E FY 2012 Volume 2
- USAF RDT&E FY 2012 Volume 3
- USN Aircraft Procurement (1-4) FY 2012
- USN Other Procurement FY 2012
- USN RDT&E Volume 1 (BA1-3) FY 2012
- USN RDT&E Volume 2 (BA 4) FY 2012
- USN RDT&E Volume 3 (BA5) FY 2012
- USN RDT&E Volume 4 (BA6) FY 2012
- USN RDT&E Volume 5 (BA7) FY 2012

Executive Briefing

Market Findings

- The forecast calls for a slight Air-Sea Battle programs decrease in 2012 and 2013 spending, followed by increases through to 2016.
- Investments are surprisingly consistent throughout each of the six report segments and 157 program or program elements.
- Space is the only segment with declining spend, a result of fulfillment on EHF, SBIRS, MUOS and WGS programs.

Key Figures

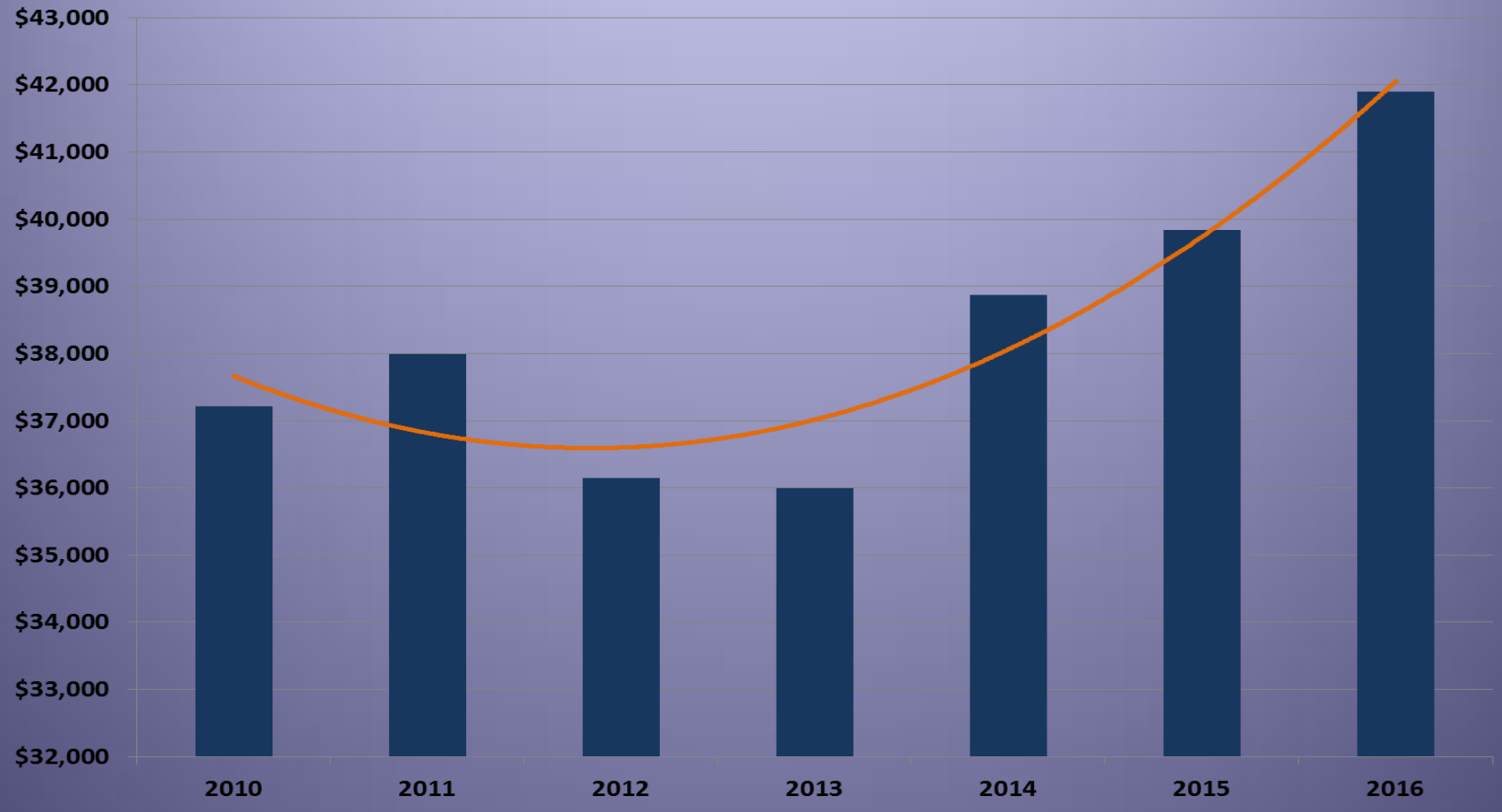
- DoD will spend $267.9 billion from FY 2010-2016 on Air-Sea Battle related procurement and RDT&E.
- Aircraft-related programs will account for 61.7 percent of this spend. F-35, with $82 billion in identified funding is the single biggest program.

Near Term Outlook

- Look for a shift in focus from low-intensity, long duration conflict to high-intensity shorter-duration scenarios.
- F-35, Virginia-Class Submarine, P-8 Maritime Patrol Aircraft, Advanced EHF and SBIRS High Satellite programs are largest acquisition elements.

Air-Sea Battle: Total DOD Spend 2010-2016

($ Million)



Source: G2 Solutions Analysis

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