The European Defence Support Services Market Report 2009

Description: The European DSS market is undergoing dramatic changes spurred by radical military restructuring programmes. For defence establishments the flipside of the peace dividend was the end of generous funding. Funding cuts demanded radical efficiency measures and drastic restructuring. Outsourcing is a consequence of this. However, for most defence establishments outsourcing is still in its infancy. This low base combined with compelling economic imperatives is driving huge growth in the demand for DSS that is irreversible.

This report examines:

- How defence establishments have arrived at their present state of outsourcing development and what are the catalysts for change?
- How budget constraints, strategic and doctrinal shifts, and increasing professionalisation have impacted attitudes towards outsourcing
- What policies are MoDs pursuing to meet their restructuring aims?
- What MoD structures are in place, or planned, to direct and administer the growing wave of industry contracts for outsourced support?
- Why DSS penetration is uneven between sustaining platforms, training, and the defence estate and how this is changing?
- Where are the opportunities for companies seeking to provide services to MoDs? Which services will militaries continue to self-provide and which ones will they relinquish to the private sector, however unwillingly, and what form will this take?

Restructuring after the cold war:

Post cold war geopolitical realities led to a reassessment of military roles and capabilities and forced defence restructuring. New pressures and influences emerged to determine what shape the military restructuring would take:

- As the emphasis shifted from 'Battlefield Europe' to the likelihood of more frequent United Nations and NATO actions, limited engagement roles, and policing missions the need for network-centric highly mobile expeditionary forces became a priority

Outsourcing is widely recognised as crucial in attaining these goals. Increasing platform complexity coupled with personnel and budgetary constraints leave modern military forces no choice but to make greater use of the private sector to support their defence capabilities. In the absence of outsourcing, combat capability quickly degrades.

Who is this report for?

Anyone seeking a definitive understanding of the European defence support services market will find this report invaluable, including:

- Defence contractors
- MoD officials and uniformed personnel concerned with outsourcing decisions
- Private equity investors looking to access outsourcing opportunities
- Consultants interested in working with MoDs and DSS providers
- Anyone with an interest in the sector and its prospects

What will this report tell you?

- Market sizes and detailed segmentation for defence support services
- MoD bodies involved in outsourcing decisions and the processes they follow to make these decisions
- MoD outsourcing strategy
- Areas that have already been outsourced and how this has been effected
- The pitfalls encountered in outsourcing and how to avoid them
- Future opportunities for outsourcing
  - their size and likely timetables

Which countries are covered?

The major European countries, namely:

- Czech Republic
- France
- Germany
- Greece
- Italy
- Poland
- Spain
- Sweden
- The Netherlands
- United Kingdom

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