The Indonesian Defense Sector - Market Opportunities and Entry Strategies, Analyses and Forecasts to 2015

Description: This report offers insights into the market opportunities and entry strategies adopted by foreign OEMs (original equipment manufacturers) to gain a market share in the Indonesian defense industry. In particular, it offers in-depth analysis of the following:

- Market opportunity and attractiveness: detailed analysis of the current industry size and growth expectations during 2010–2015, including highlights of the key growth stimulators. It also benchmarks the industry against key global markets and provides detailed understanding of emerging opportunities in specific areas.
- Procurement dynamics: trend analysis of imports and exports, together with its implications and impact on the Indonesian defense industry.
- Industry structure: five forces analysis to identify various power centers in the industry and how these are likely to develop in the future.
- Market entry strategy: analysis of possible ways to enter the market, together with detailed descriptions of how existing players have entered the market, including key contracts, alliances, and strategic initiatives.
- Competitive landscape and strategic insights: analysis of competitive landscape of the defense industry in Indonesia. It provides an overview of key defense companies (both domestic and foreign), together with insights such as key alliances, strategic initiatives, and a brief financial analysis.
- Business environment and country risk: a range of drivers at country level, assessing business environment and country risk. It covers historical and forecast values for a range of indicators, evaluating business confidence, economic performance, infrastructure quality and availability, labor force, demographics, and political and social risk.

Scope of the report:

- analysis of Defense industry market size from 2004 through 2009 and forecasts till 2015
- analysis of defense budget allocation
- Benchmarking with key global markets
- Market opportunities
- Defense procurement dynamics
- Industry dynamics
- Market entry strategy
- Competitive landscape and strategic insights
- Business environment and country risk

Reasons to buy:

- Gain insight into Indonesian defense industry with current, historic and forecast market values
- Get insight on market opportunity and attractiveness
- Get insight on industry procurement dynamics
- Gain insight on industry structure
- Gain insight into the regulations governing the Indonesian defense industry and the potential market entry strategies with an expert analysis of the competitive structure
- Identify top companies of the Indonesian defense industry along with profiles of all those companies

Key highlights:

The Indonesian defense market, estimated to value US$3.7 billion in 2009, is expected to grow at a CAGR of 12.85% to reach US$7.6 billion by 2015. The primary stimulator of defense expenditure is the government military modernization program, undertaken in order to compensate for the severe military underfunding over the last five years. It is currently estimated that the defense budget is capable of satisfying only 52% of required military defense expenditure. Indonesia is frequently affected by natural disasters for the majority of which the army is deployed on search and rescue operations. In preparation for future natural disasters, government expenditure is expected to increase in defense sectors during the forecast period. Indonesia's geographical make-up comprises of over 17,000 islands, and the existence of a border dispute with Malaysia
is another factor fueling defense investment. In addition, there has been an increase in criminal activity such as illegal fishing, illegal logging, human trafficking, pirate attacks, and arms smuggling along the Indonesian coast. Over the review period, the country's defense expenditure was 0.8% of GDP (gross domestic product), a trend which is expected to continue until 2015. During the forecast period, GDP is expected to grow at an average of 9%, and defense expenditure increase accordingly. Capital and revenue expenditure followed a 35% and 65% allocation respectively of the overall defense budget. However, as a result of government plans to modernize the military through the acquisition of the latest weaponry, capital expenditure is expected to be an average of 38% of the total defense budget, with the remainder allocated for revenue expenditure.

Defense sectors such as patrol vehicles, submarines, military transport aircrafts, trainer and fighter aircrafts, unmanned aerial vehicles, radar systems, and warships are expected to present key market opportunities.
5.1.2 Bargaining power of buyer: high to low
5.1.3 Barrier to entry: medium
5.1.4 Intensity of rivalry: low to medium
5.1.5 Threat of substitution: high
6 Market Entry Strategy
6.1 Market Regulation
6.1.1 Defense investment policy conducive to both domestic and foreign investment
6.1.2 New procurement policy to support small and medium enterprises
6.2 Market Entry Route
6.2.1 Foreign defense suppliers enter the Indonesian defense market primarily through joint ventures
6.3 Key Challenges
6.3.1 Small defense budget deters investment
6.3.2 Challenges in defense management practices obstruct efficient utilization of resources
7 Competitive Landscape and Strategic Insights
7.1 Competitive Landscape Overview
7.2 Key Public Sector Companies
7.2.1 PT Dirgantara Indonesia: overview
7.2.2 PT Dirgantara Indonesia: product focus and services
7.2.3 PT Dirgantara Indonesia: recent announcements and strategic initiatives
7.2.4 PT Dirgantara Indonesia: alliances
7.2.5 PT Dirgantara Indonesia: recent contract wins
7.2.6 PT Dirgantara Indonesia: financial analysis
7.2.7 PAL Indonesia: overview
7.2.8 PAL Indonesia: products focus and services
7.2.9 PAL Indonesia: recent announcements and strategic initiatives
7.2.10 PAL Indonesia: alliances
7.2.11 PAL Indonesia: contract wins
7.2.12 PAL Indonesia: financial analysis
7.2.13 PT Pindad: overview
7.2.14 PT Pindad: products focus and services
7.2.15 PT Pindad: recent announcements and strategic initiatives
7.2.16 PT Pindad: alliances
7.2.17 PT Pindad: recent contract wins
7.2.18 PT Pindad: financial analysis
7.2.19 Dok & Perkapalan: overview
7.2.20 Dok & Perkapalan: product focus and services
7.2.21 Dok & Perkapalan: recent announcements and initiatives
7.2.22 Dok & Perkapalan: alliances
7.2.23 Dok & Perkapalan: contracts
7.2.24 Dok & Perkapalan: financial analysis
7.3 Key Private Sector Companies
7.3.1 PT Dahana: overview
7.3.2 PT Dahana: products focus and services
7.3.3 PT Dahana: recent announcements and strategic initiatives
7.3.4 PT Dahana: alliances
7.3.5 PT Dahana: recent contract wins
7.3.6 PT Dahana: financial analysis
7.3.7 PT Multiintegra: overview
7.3.8 PT Multiintegra: product focus and services
7.3.9 PT Multiintegra: recent announcements and strategic initiatives
7.3.10 PT Multiintegra: alliances
7.3.11 PT Multiintegra: contracts
7.3.12 PT Multiintegra: financial analysis
7.3.13 Radar and Communications Systems: overview
7.3.14 Radar and Communications Systems: product focus and services
7.3.15 Radar and Communications Systems: recent announcements and initiatives
7.3.16 Radar and Communications Systems: alliances
7.3.17 Radar and Communications Systems: recent contract wins
7.3.18 Radar and Communications Systems: financial analysis
7.3.19 Cipta Taruna: overview
7.3.20 Cipta Taruna: product focus and services
7.3.21 Cipta Taruna: recent announcements and initiatives
7.3.22 Cipta Taruna: alliances
7.3.23 Cipta Taruna: recent contract wins
7.3.24 Cipta Taruna: financial analysis
7.3.25 Wellracom Group: overview
7.3.26 Wellracom Group: product focus and services
7.3.27 Wellracom Group: recent announcements and initiatives
7.3.28 Wellracom Group: alliances
7.3.29 Wellracom Group: recent contract wins
7.3.30 Wellracom Group: financial analysis
7.3.31 PT SOG Indonesia: overview
7.3.32 PT SOG Indonesia: product focus and services
7.3.33 PT SOG Indonesia: recent announcements and strategic initiatives
7.3.34 PT SOG Indonesia: alliances
7.3.35 PT SOG Indonesia: recent contract wins
7.3.36 PT SOG Indonesia: financial analysis
8 Business Environment and Country Risk
8.1 Business Confidence
8.1.1 Business Confidence Index
8.1.2 Market Capitalization Trend – The Indonesia Stock Exchange (IDX), Indonesia
8.1.3 FDI Inflows by Sector
8.1.4 Deployment of Credit by Sector
8.2 Economic Performance
8.2.1 GDP at Constant Prices
8.2.2 GDP per Capita at Constant Prices
8.2.3 GDP at Current Prices
8.2.4 GDP Per Capita at Current Prices
8.2.5 GDP Split by Key Segments
8.2.6 Agriculture – Agriculture Net Output Value at Current Prices (Local Currency)
8.2.7 Agriculture – Agriculture Net Output Value at Current Prices (US Dollar)
8.2.8 Agriculture – Agriculture Output at Current Prices as Percentage of GDP
8.2.9 Manufacturing – Manufacturing Net Output at Current Prices (Local Currency)
8.2.10 Manufacturing – Manufacturing Net Output at Current Prices (US Dollar)
8.2.11 Manufacturing – Manufacturing Output-Current Prices as Percentage of GDP
8.2.12 Manufacturing – Mining, Manufacturing, and Utilities at Current Prices (Local Currency)
8.2.13 Manufacturing – Mining, Manufacturing, Utilities at Current Prices (US Dollars)
8.2.14 Manufacturing – Mining, Manufacturing, Utilities at Current Prices, as Percentage of GDP
8.2.15 Construction – Construction Output at Current Prices, (Local Currency)
8.2.16 Construction – Construction Output-Current Prices
8.2.17 Construction – Construction Output-Current Prices as a % of GDP
8.2.18 Industry - Crude Steel Production
8.2.19 Industry - Crude Oil Consumption
8.2.20 Inflation Rate
8.2.21 Fiscal Deficit as a Percentage of GDP
8.2.22 Trade Balance as a Percentage of GDP
8.2.23 Exports as a Percentage of GDP
8.2.24 Imports as a Percentage of GDP
8.2.25 Exports Growth
8.2.26 Imports Growth
8.2.27 External Debt as Percentage of GDP
8.2.28 Exchange Rate US$-IDR (Annual Average)
8.2.29 Exchange Rate US$-PLN (End of Fiscal)
8.2.30 Debt Service Ratio
8.3 Infrastructure Quality and Availability
8.3.1 Transport – Total Airports and Ports
8.3.2 Transport – Highways and Railways
8.3.3 Transport - Passenger Vehicle Production Volume
8.3.4 Transport - Commercial Vehicle Production Volume
8.3.5 Transport - Automotive Components Export Trend
8.3.6 Transport - Automotive Products Import Trend
8.3.7 Transport - Passenger Car Penetration
8.3.8 Utilities - Total Installed Capacity for Electricity Generation
8.3.9 Utilities - Installed Capacity for Conventional Thermal Electricity Generation
8.3.10 Utilities - Electricity Production
8.3.11 Utilities - Installed Capacity for Hydro-electricity Generation
8.3.12 Utilities - Installed Capacity for Renewable Electricity Generation
8.3.13 Utilities - Electric Power Consumption
8.3.14 Healthcare - Healthcare Expenditure
8.3.15 Healthcare - Healthcare Expenditure as % GDP
8.3.16 Healthcare - Healthcare Expenditure Per Capita
8.3.17 Technology – R&D Expenditure as a percentage of GDP
8.3.18 Communication - Total Internet Subscribers
8.3.19 Communication - Broadband Internet Subscribers
8.3.20 Communication - Personal Computer penetration
8.3.21 Communication – Mobile Phone Penetration Rate
8.4 Labor Force
8.4.1 Labor Force
8.4.2 Unemployment Rate
8.5 Demographics
8.5.1 Annual Disposable Income
8.5.2 Annual Per Capita Disposable Income
8.5.3 Urban and Rural Population
8.5.4 Female as Percentage of Population
8.5.5 Male as Percentage of Population
8.5.6 Mean Age of Population
8.5.7 Median Age of Population
8.5.8 Population Density
8.5.9 Age Distribution – Total Population
8.5.10 Age Distribution-Male Population
8.5.11 Age Distribution-Female Population
8.5.12 Manufacturing – Manufacturing Output-Current Prices as Percentage of GDP
8.6 Political and Social Risk
8.6.1 Manufacturing - Manufacturing Output-Current Prices as Percentage of GDP
8.6.2 Manufacturing - Manufacturing Output-Current Prices as Percentage of GDP
8.6.3 Manufacturing - Manufacturing Output-Current Prices as Percentage of GDP

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