



Global Defence Market

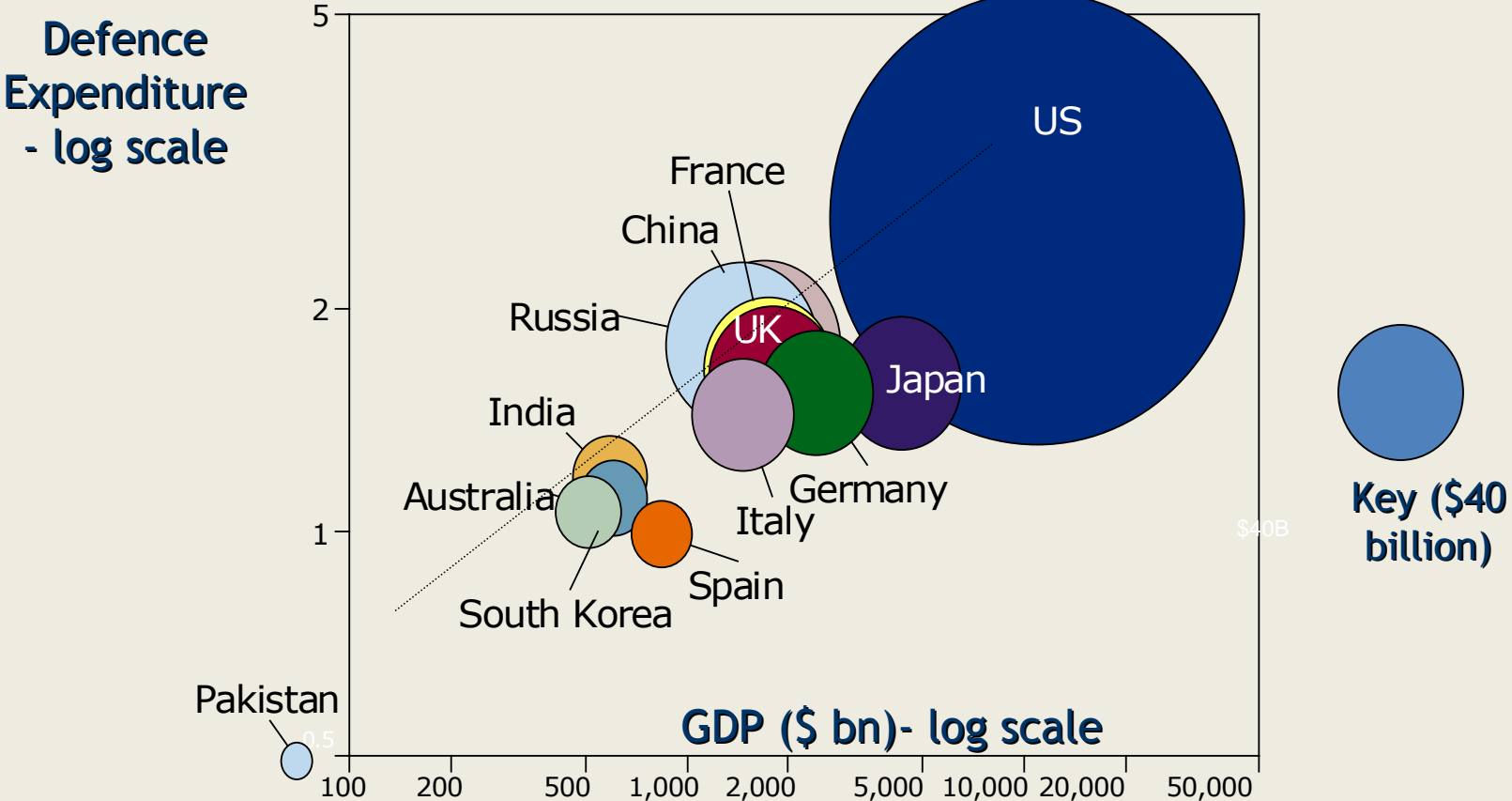
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Equipment to Support Defence

- UN Charter
- Imports necessary to support independent:
 - Foreign Policy
 - Defence Policy
 - Industrial Policy
- All countries import defence equipment

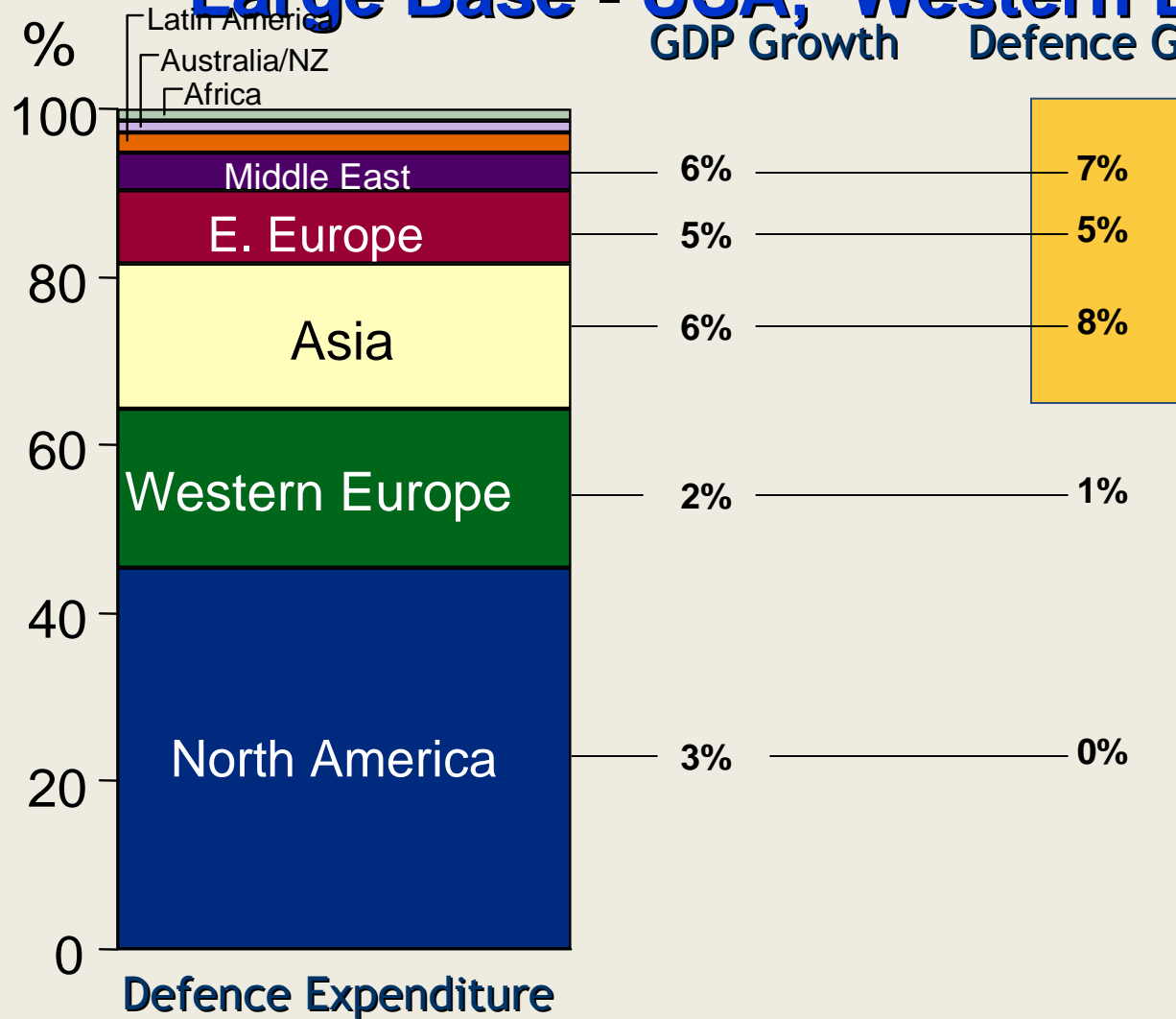
Defence Spending.....Driven by the Protection of GDP



Source:Parthenon

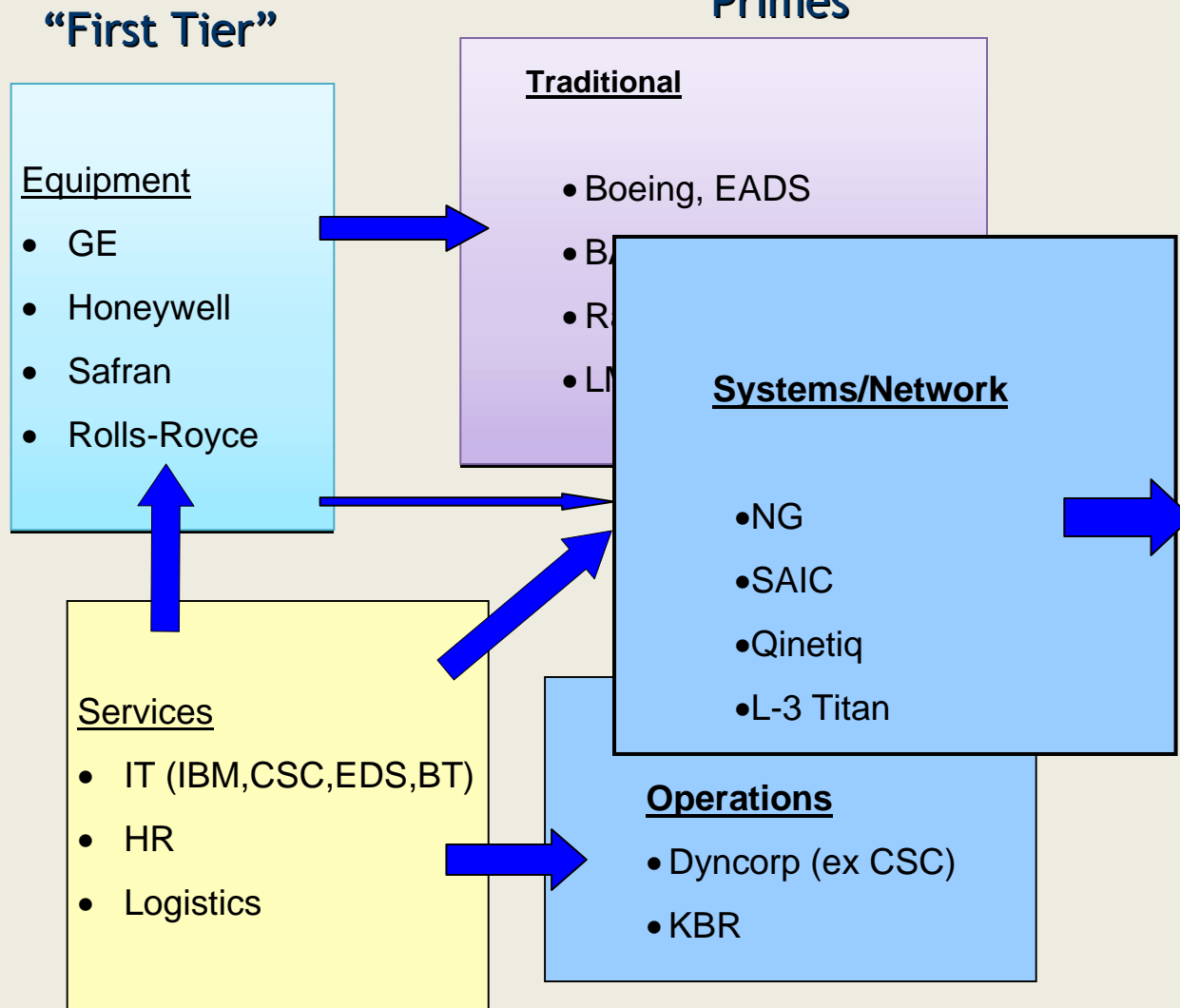
High Growth - China, SE Asia, Mid-East, E. Europe

Large Base - USA, Western Europe



Emergence of Systems & Operations

'Primes'



Defence Equipment Exporters

- USA
- UK
- France
- Germany
- Russia
- PRC
- Israel

But, how reliable?...

Self-Sufficiency in Short/Medium Term

- Government-to-Government agreement
- Inter-operable with whom?
- Appropriate technologies
- Sufficient training and stock