

A third industrial evolution or revolution in defence?



ANNUAL CONFERENCE OF THE EUROPEAN DEFENCE AGENCY
BRUSSELS, 10 NOVEMBER 2016

WELCOME WORD

A (R)EVOLUTION IN EUROPEAN DEFENCE COOPERATION



It is a privilege to welcome you to the European Defence Agency's 2016 annual conference. We gather at a defining moment for European defence. The events of this year have the potential to relaunch the European defence project. These developments have added a profound sense of momentum, which should be built upon to see Europe truly deliver on its potential in defence. As the title of this year's edition, "a third industrial evolution or revolution in defence?", suggests, there is a clear window of opportunity before us.

New dynamics continue to shape the future of European defence. The publication of the EU's new 'Global Strategy for Foreign and Security Policy' (EUGS) was one of the most significant steps forward. At its core, it calls for a more credible, efficient and interoperable European defence. While there is much to applaud about the EUGS, its success will be judged by its practical and concrete implementation. With the EUGS on the table, the critical work of implementation has to begin. For Europe to live up to the responsibilities set out in this strategy, it needs a sustainable, innovative and competitive defence industry. To ensure success, all actors will need to put cooperation, R&T and interoperability at the core of their work.

The EUGS has set out a high level of ambition which needs to be matched by a high level of action and delivery. To ensure that European defence can respond to the demands of the EUGS, it needs a catalyst which can ignite a revolution in European defence cooperation. While there have been some positive steps forward to incentive it, most notably the VAT exemption for EDA cooperation projects, cooperation in defence is still not part of Europe's DNA.

To seize upon these new dynamics, offers us the prospect to launch cooperative programmes that deliver cutting-edge capabilities and provide a real benefit to the Member States. By using the full potential of this Agency, Member States have a clear avenue to translate political goals into military objectives. The Capability Development Plan (CDP), which outlines the capabilities identified by the Member States, will continue to serve as the reference point for project identification. Each year, this Agency grows its expertise and track record of delivery. The EDA has now passed the 180 mark in terms of projects facilitated and managed since its inception, representing over €800 million in R&T investment by the contributing Member States. The EDA remains at the service of its Member States and is ready to do its part to support, propose solutions and provide new lines of action in European defence.

To truly make cooperation between Member States the norm, we need tools which will instil defence cooperation as the go to option for Member States. The proposed Preparatory Action for a substantive defence research programme, and the ongoing related Pilot Project, are key elements in this regard, but do not represent a final destination. These steps forward must not be viewed as a green light to cut back national or multinational investment in defence research, including ad hoc projects in the EDA. Europe cannot afford to go back as investment in defence research, at an aggregate level, is already at an all-time low. These programmes represent the tools with which we can build a comprehensive European funded defence research programme. By putting the spotlight on the incentives which enhance collective research now, we can create the conditions to deliver effective and cost-efficient cutting-edge capabilities.



Going forward, these first research programmes, which are based on the CDP priorities, coupled with the upcoming review of the CDP, have the scope to create a paradigm shift in European defence. One which moves us towards a next level European funded defence research programme, and one that can ultimately act as the catalyst to make cooperation between Member States on defence research the norm.

The spill-over effects from these programmes and collaborations will be profoundly felt in the field of innovation, which is at the heart this year's EDA Annual Conference. Innovation is the foundation upon which R&T, cutting-edge technology and defence capabilities are built. The wider benefits to society in terms of economic growth and employment demand that we create the conditions for a truly innovative Europe. Innovation across sectors can equally be funnelled into the field of defence. Big data, biotechnology, nanotechnology and deep intelligence are just some of the fields that will have a profound impact on Europe's ability to develop strategic assets for current and future challenges. European cooperation will remain the most efficient and cost effective way to innovate, simultaneously ensuring Europe's strategic autonomy, boosting industry and stimulating growth. Supporting the link between innovation and defence capabilities is crucial as an innovative Europe will ensure a militarily capable Europe.

Today, at the EDA Annual Conference, I hope that all participants will take the opportunity to continue advancing European defence cooperation, by engaging in debates, learn, network and challenge the issues surrounding the evolution or revolution in defence.

I wish you a fruitful and insightful day at the EDA Annual Conference 2016.

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Jorge DOMECCO

Chief Executive of the European Defence Agency

AGENDA

10 NOVEMBER 2016

Conference Moderator **Graham Muir**

09.30 REGISTRATION & COFFEE

10.30 Welcome address

by Jorge DOMEQ, *Chief Executive of the European Defence Agency*

10.35 Opening speech

by Federica MOGHERINI, *Head of the European Defence Agency, High Representative and Vice-President of the European Commission*

11.00 Breakthrough speech: And now the future!

By Stephan DE SPIEGELEIRE, *Principal Scientist, the Hague Centre for Strategic Studies*

11.30 PANEL 1:

Opportunities and challenges from the supply side

12.45 LUNCH

14.15 Keynote speech

by Róbert Ondrejcsák, *State Secretary of the Ministry of Defence of the Slovak Republic*

14.30 PANEL 2:

Opportunities and challenges from the demand side

16.00 Outlook speech

Elzbieta BIENKOWSKA, *European Commissioner for Internal Market, Industry, Entrepreneurship and SMEs*

16.15 Closing remark

by Jorge DOMEQ, *Chief Executive of the European Defence Agency*

16.30 END OF THE PROGRAMME

THE CONFERENCE CONTINUES ON SOCIAL MEDIA



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CONFERENCE MODERATOR: GRAHAM MUIR

Graham Muir, Head of Strategy & Policy Unit, European Defence Agency, will be the master of ceremony and moderator of the 2016 EDA Annual Conference.

Graham Muir was appointed Head of Strategy & Policy on 1 April 2011. In this position, he is responsible for strategic development and policy coordination with the Member States and other EU bodies.

From 2007, until joining the Agency, he was responsible within the Crisis Management and Planning Directorate in the General Secretariat of the EU Council (latterly in the European External Action Service) for the EU's military operation in Bosnia and Herzegovina, as well as being the EU Political Advisor to the Operation Commander. He has previously worked in a wide range of policy positions dealing with defence at the United Kingdom Permanent Representation to the European Union, the UK Delegation to NATO, and the UK Embassy in Paris, amongst others.

10.30 WELCOME ADDRESS



by Jorge DOMEQCQ, *Chief Executive of the European Defence Agency*

Jorge Domecq is the Chief Executive of the European Defence Agency, having assumed the role on 01 February 2015. Prior to his appointment, Jorge Domecq, a senior Spanish diplomat, served as Ambassador Permanent Representative of Spain to the Organisation for Security and Cooperation in Europe (OSCE) and as Ambassador of Spain to the Republic of the Philippines.

Since the start of his diplomatic career in 1985, Jorge Domecq has held several positions with the Spanish Ministry of Foreign Affairs where he acted as Director General for United Nations, Global Affairs and Human Rights, as well as Director General for Multilateral Affairs. He also acted as Director of the Private Office of the NATO Secretary General and as Diplomatic Adviser to the Spanish Minister of Defence.



10.35 OPENING SPEECH



by Federica MOGHERINI, *Head of the European Defence Agency, High Representative and Vice-President of the European Commission*

Federica Mogherini is the Head of the European Defence Agency, in her role as High Representative of the Union for Foreign Affairs & Security Policy/Vice-President of the European Commission. Federica Mogherini leads the European External Action Service and chairs meetings of EU foreign ministers.

Federica Mogherini had been appointed in February 2014 as Minister for Foreign Affairs and International Cooperation by Italian Prime Minister Matteo Renzi. A member of the Democratic Party, she was first elected to the Chamber of Deputies in 2008, then re-elected in 2013. On 1 August 2013 she was elected Chair of the Italian Delegation to the Parliamentary Assembly of NATO. She also coordinated the Inter-Parliamentary Group for Development Cooperation.

Federica Mogherini is also a member of the Institute for Foreign Affairs (IAI), the Council for the United States and Italy and a fellow of the German Marshall Fund of the United States.

11.00 BREAKTHROUGH SPEECH: AND NOW THE FUTURE!



Stephan DE SPIEGELEIRE, *Principal Scientist, the Hague Centre for Strategic Studies*

Stephan has worked as defence and security analyst at the RAND Corporation for nearly ten years, interrupted by a three-year stints at SWP (Germany) and the WEU's Institute for Security Studies (France).

Since 2004 he has been working in research institutes in the Netherlands (TNO/HCSS) and has been teaching at Webster University and military academies across the world. Stephan's main research area is international defence and security planning, with a special focus on security foresight, risk assessment, (comprehensive) capabilities-based planning, defence management, human-centred defence design; and open innovation.

Recent books include *Great Power Assertivitis* (2016), *Better Together. Towards a Defence and Security Ecosystem* (2016), *Si Vis Pacem, utique Para Pacem. Individual Empowerment, Societal Resilience and the Armed Forces* (2016), *Taking the High Ground 3.0. The Future of Air Power* (2015), *Designing Future Stabilisation Efforts* (2014).

11.30 **PANEL 1:** OPPORTUNITIES AND CHALLENGES FROM THE SUPPLY SIDE

The first panel features high-profile industrialists sharing their views on current and future innovation patterns linked to a third industrial revolution. The panel will discuss the impact of global competition and the need to effectively spin in leap-ahead technologies on corporate cultures, global partnerships, business models and supply chains as well as relations with governments.



Lowri EVANS, *Director General DG Internal Market, Industry, Entrepreneurship and SMEs, European Commission*

Lowri Evans was appointed Director-General of DG Internal Market, Industry, Entrepreneurship and SMEs on 1 September 2015. She has been Director-General in DG Maritime Affairs and Fisheries from 2010 to 2015. Prior to that, she has worked in several policy areas in the European Commission notably Competition and Employment. She started her professional career in audit and accountancy with Deloitte.



Heikki ALLONEN, *Former CEO and President, Patria*

Heikki Allonen acted as President and CEO of Patria Oyj, the Finnish national defence industry group, from 2008 to August 2016. His career spans over 30 years of working for the Finnish industry. Prior to joining Patria Oyj, Mr Allonen was President and CEO of the listed consumer goods company Fiskars Corporation. He has also held the position of President in the construction management company SRV Group and has worked in senior management positions in Metra and Wartsila Corporation; the latter company is now well-known for its engagement in power generation and maritime applications based on diesel power.

Mr Allonen is i.a. Chairman of the AFDA (Association of Finnish Defence and AeroSpace Industries) and a member of the Board of Directors of The Federation of Finnish Technology Industries (TT). Mr Allonen is a major in the reserve forces and was recently awarded the Commander's Cross of the Order of the Finnish Lion.



Frank HAUN, CEO, Krauss-Maffei Wegmann GmbH & Co. KG / Co-CEO, KMW+Nexter Defense Systems N.V.

Frank Haun, born in January 1959 in Marburg/Lahn (Germany), joined Krauss-Maffei Wegmann GmbH & Co. KG in 2003 as Member of the Board. He became President and CEO of KMW in 2006 and since 2012 President of the Management Board of Wegmann Unternehmens-Holding GmbH & Co. KG. 2015 he was appointed as Co-CEO of KNDS (KMW+Nexter Defense Systems N.V.).

His career began 1986 at Carl Schenck AG. In 1999 he was appointed Member of the Board of Management and in 2000 President and CEO of Carl Schenck AG. Additionally he was appointed Member of the Board of Dürr AG in 2001.

Frank Haun is Vice President of the Federal Association of the German Security and Defence Industry and of the Association of the German Army e.V.. Beyond that he holds various functions in committees and advisory boards. He is Member of the Board of Directors of the Atlantic Council and Member of the Advisory Council of the Munich Security Conference.



Pedro SINOGAS, CEO, Tekever

Mr. Pedro Sinogas is the founder and CEO of TEKEVER since its inception in 2001, and has lead the team from the startup stage to a multinational technology company with engineering capabilities in Europe, US, China and Brazil. He studied computer engineering and is specialised in complex systems modelling and technology management. With more than 15 years of experience in research and technology intensive projects, Mr. Sinogas has worked and coordinated several large projects. He previously worked as a researcher and lecturer in the Department of Computer Science of Instituto Superior Técnico.



Prof. Witold HOŁUBOWICZ, CEO, ITTI

Prof. Witold HOŁUBOWICZ graduated from Poznan Technical University in 1981, where he also received his Ph.D. at the Electrical Engineering Faculty. He pursued a professional career in two areas: in the academic world and in business activities.

He has been a professor in the area of ICT at several universities: Poznan Technical University, Polytechnic University in New York, New Jersey Institute of Technology, Franco-Polish School of New Information and Communication Technologies in Poznan and University of Technology and Life Science in Bydgoszcz.

He is currently the Head of the Division of Applied Informatics at Adam Mickiewicz University in Poznan. In 1996 he co-founded a private research/consulting company ITTI Ltd., in Poznan where he has been the President since 1997. He participated in or coordinated more than a hundred consulting, implementation and research projects on radio communications, teleinformatics and telecommunication systems. He is the author or co-author of over a hundred publications, including four books on wireless communications.

14.15 KEYNOTE SPEECH



by Róbert Ondrejcsák, State Secretary of the Ministry of Defence of the Slovak Republic, EU Presidency

Dr. Róbert Ondrejcsák was appointed State Secretary of the Ministry of Defence of the Slovak Republic in September 2016. In 2012-2016 he acted as a director of the Centre for European and North Atlantic Affairs (CENAA). In 2016, Dr. Ondrejcsák also established a new think-tank, the Strategic Policy Institute – STRATPOL, which he recently leads. In 2010-2012 Dr. Ondrejcsák was State Secretary/Deputy Minister of Ministry of Defence of the Slovak Republic, where he led the process of Strategic Defence Review, preparation of White Book on Defence and the Armed Forces reform. Dr. Ondrejcsák was also responsible for security policy, NATO and EU issues, as well as international multilateral and bilateral cooperation. Previously Dr. Ondrejcsák was a Director of the Institute for Security and Defence Studies (research centre of the Slovak Ministry of Defence), he also served as a Counsellor and Deputy Chief of the Mission of the Slovak Embassy to Hungary, as well as Foreign and Security Policy advisor to Vice-Chairman of the Slovak Parliament, advisor of the NATO Department at the Slovak Ministry of Defence and analyst of the Slovak Centre for Strategic Studies.





14.30 **PANEL 2:** OPPORTUNITIES AND CHALLENGES FROM THE DEMAND SIDE

The second panel features high-profile representatives from national governments and EU institutions who share their views on implications for the defence sector at large. Some of the aspects they will touch upon are possible whole-of-government policies in support of strategic innovation, emerging risks and vulnerabilities in terms of technology control. They will also discuss questions about interfaces with industry as well as the likely impact on acquisition choices and life-cycle management.



Rear Admiral Matteo BISCEGLIA, *Director for Naval Armaments, Italy*

Rear Admiral (UH) Matteo Bisceglia was born in Manfredonia (*Puglia*) on the 22nd of September 1957. He joined the Navy in 1976 and graduated in electrotechnic engineering from Pisa University. Upon completion of his sea tour, he acquired great experience in the maintenance and logistic field working in Navy yards and in the procurement area across several appointments in the Naval Armament Directorate. He also worked in the Navy General Staff as the head of the Combat System Department.

In 1990-1993 he was the Navy Representative in the NSPO (NATO SEA SPARROW Project office in Washington DC) consortium and has been the Programme Manager of the FREMM (*Multi Mission Fregates*) Programme Division in OCCAR for about 4 years starting in 2010.

Since 2014, Rear Admiral Bisceglia is the Director for Naval Armaments and is the Italian co-chairman of IT-FR FREMM (*Multi Mission European Fregates*) Programme Committee and the Chairman of the PPA (*Pattugliatori polivalenti d'Alture*) and LSS (*Logistic Support Ship*) Programme Committee. He is expected to become the OCCAR-EA Director in 2019.



Ioan Mircea PAŞCU, *Vice-President of the European Parliament*

Ioan Mircea Paşcu MEP is Vice President of the European Parliament, Vice Chair of the Committee on Foreign Affairs (AFET) and S&D Coordinator for Security and Defence. Before 2007 he was Observer in the European Parliament. Since 2007, Ioan Mircea Paşcu is Vice Chair AFET, working on CFSP / CSDP matters, including as Rapporteur for the EU's CSDP, mutual defence and security clauses and the strategic situation in the Black Sea. Since 1990, he has held high political and public office positions, including as Minister of Defence of Romania (2000-2004), contributing substantially to the admission of Romania into NATO. Since 1990, Ioan Mircea Paşcu is professor of International Relations at the National University of Political and Administrative Studies.



Vice Admiral Mark MELLETT, *Chief of Defence, Ireland*

Vice Admiral Mark Mellett is the Chief of Staff of Óglaigh na hÉireann, the Irish Defence Forces, having been promoted to the appointment by the Irish Government on 29 September 2015. Prior to his current position, Vice Admiral Mellett was the Deputy Chief of Staff of the Irish Defence Forces where he had responsibility for materiel and support functions, including personnel, finance and logistics in the Army, Air Corps and Naval Service. He has forty years service, much of it seagoing, including three naval commands. Vice Admiral Mellett perviously served as Flag Officer Commanding the Irish Naval Service. During shore rotations he held appointments in Naval Headquarters, Naval Operations and Support Commands. In addition to citations for service in Afghanistan (2004) and Lebanon (1989) in 1994 Vice Admiral Mellett was decorated by the Irish State, receiving "The Distinguished Service Medal (DSM)" for intercepting a major maritime narcotics shipment.



Lieutenant General Erhard BÜHLER, *Director Defence Plans & Policy and Head of the Directorate General for Planning at the Federal Ministry of Defence, Germany*

Lieutenant General Erhard Bühler joined the German Federal Armed Forces in 1976. Between 1984 and 2013 he held command positions within the armed forces as well as senior posts at the German Ministry of Defence. In 2013, he was appointed Commander of the NATO Joint Warfare Centre in Stavanger. He has held his current position of Director Defence Plans & Policy and Head of the Directorate General for Planning in the Federal Ministry of Defence in Bonn since August 2014. Lieutenant General Bühler also served in two combat missions. In 2004 he deployed to Prizren as Commander of the 9th German Kosovo Force Contingent and from 2010 to 2011 he served as NATO Commander KFOR in Pristina.



General Denis MERCIER, *Supreme Allied Commander Transformation, NATO*

General Denis Mercier was confirmed by the North Atlantic Council as Supreme Allied Commander Transformation on 23 March 2015. He joined the French Air Force academy in 1979. Qualified as a fighter pilot in 1983, he acquired extensive experience both as an operational commander and as a fighter pilot, having flown a total of more than 3000 flying hours primarily on Mirage F1C and Mirage 2000C aircraft, including 182 hours in combat missions.

Above all, NATO has been a constant throughout his career, at the tactical, operational and strategic level. Following his nomination as senior military advisor for the minister of Defense in 2010, General Mercier prepared and participated in all NATO ministerial meetings between 2010 and 2012, as well as the NATO summits of Lisbon and Chicago. Moreover, he was the minister's special advisor for Operation Unified Protector over Libya. He became the French Air Force Chief of Staff on September 17th 2012.



16.00 OUTLOOK SPEECH



Elzbieta Bieńkowska, *European Commissioner for Internal Market, Industry, Entrepreneurship and SMEs*

Elzbieta Bieńkowska is the European Commissioner for Internal Market, Industry, Entrepreneurship and SMEs, a role she assumed in 2014.

Her political career started in Poland in 1999 when she became Director of the Regional Development Office - Marshal's Office of Silesia Region. Ms Bieńkowska held this position until 2007 when she became Minister of Regional Development. In 2013, she was appointed Deputy Prime Minister and Minister of Infrastructure and Development.

16.15 CLOSING REMARK



by **Jorge DOMEcq**, *Chief Executive of the European Defence Agency*

16.30 END OF PROGRAMME



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NEXTER CEO / KNDS co-CEO



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