

A large, stylized globe in shades of blue and white, showing the continents. The text of the title is overlaid on the globe.

Challenges and Opportunities in Transatlantic Defence Industrial Co-operation Conference

NATO HQ BRUSSELS
15-16 October 2009

Conference Report

Volume One

Disclaimer Statement

This report reflects the views expressed at the conference and its outcome and does not represent official NATO and RUSI positions.

Volume 1 – Report on Main Conference

Volume 2 – Reports and Briefings of Panel Sessions

Volume 1

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Executive Summary

The Trans-Atlantic Defence Industrial Co-operation (TADIC) Conference, hosted jointly by the Conference of National Armaments Directors (CNAD) and the Royal United Services Institute (RUSI) on 15th and 16th October 2009 at NATO Headquarters, Brussels, sought solutions to improve government-industry defence technological and industrial cooperation to support NATO capability development and strengthen interoperability. Specifically the Conference looked at how to promote a strong and better integrated Defence Technology and Industry Base in North America and Europe.

The Conference was attended by 260 delegates, representing senior leadership from nations, NATO, European Union (EU), industry and academia. The event was sponsored by Charles River Associates, BAE Systems and Boeing.

The Conference began with Keynote addresses from Dr Ashton Carter, Under Secretary of Defense for Acquisition, Technology and Logistics, Office of the US Secretary of Defense and Mr Håkan Jevrell, the State Secretary to the Swedish Minister of Defence. Mr Jevrell spoke for the EU, as Sweden was holding the EU Presidency at the time of the Conference. The addresses set the scene for the remainder of the Conference and presented views on cross-border and trans-Atlantic defence procurement issues, from both the US and EU perspectives.

Discussions addressed shrinking defence budgets on both sides of the Atlantic; multi-national cooperation on a political, military, and industrial level; the particular and longstanding challenge of technology transfer, the US-European relationship, and the role of a healthy transatlantic industrial base as an important enabling capability of the NATO alliance. The Conference generated a number of recommendations for follow-up at Alliance and national levels to support both intra-European and trans-Atlantic defence co-operation. The salient recommendations are:

- Encouraging and stimulating greater US-EU dialogue on defence industrial matters.
- Improving the understanding of export control procedures and processes by developing:
 - training for the Export Control officials
 - a standard trans-Atlantic Glossary of Export Control terms.
- Developing a NATO Industry forum where the senior leadership of industry can engage with NATO's senior political and military leadership on a formal basis.
- Holding annual TADIC conferences to complement the work of the NATO Industrial Advisory Group (NIAG) and any future NATO Industry Board, and to provide a forum for developing and promoting solutions to trans-Atlantic co-operation issues.

The conference discussions were organised around four Panel Sessions:

Panel 1. Defence Spending in the Lean Years and Preparation for Growth in 2010: Co-operative, Multinational Solutions?

- Preparing for the Economic Downturn: Efficiency and Effectiveness
- National Strategies, Multinational Solutions: The Way Forward?

There was general acceptance that the economic downturn would present defence acquisition challenges in the short to medium term, and that measures to promote multinational programmes

and enhance trans-Atlantic co-operation in this environment should be encouraged. Multi-national programmes were seen as a potential way to introduce high-tech solutions at a more affordable cost and to provide needed capabilities beyond the capacity of nations to develop individually.

However, speakers acknowledged that multinational programmes must address participating governments' national interests. Industry requires nations to agree operational requirements, and benefits from cooperation across NATO and EU nations. Another issue raised was the concern in some nations over security of supply, although it was acknowledged that such concerns could be mitigated by the creation of a culture of trust resulting from more transparency, further harmonisation and by the introduction of more straightforward licensing procedures.

Panel 2. Principles for Applying Restrictions on Technology Transfer : Protecting Technology, Enhancing Interoperability

- Sensitive Risks in Balance: Reforming Technology Transfer Processes
- The Technology Gap and its Impact on Military and Industrial Co-operation

The technology gap was not considered an issue in itself, but technology transfer depends on national will, with foreign and security policy playing an integral part in technology transfer decisions, particularly in the US. Nevertheless, the US and EU nations were encouraged to explore specific export control de-regulation to facilitate co-operation among Allies.

The introduction of the new EU Directive on cross-border co-operation and the US review of export control and licensing procedures were both seen as important developments offering potential for the future. It was a general view of the Conference that this current 'window of opportunity' should be exploited by the NATO Alliance in order to facilitate an improved trans-Atlantic dialogue between the EU and US with the aim of influencing the harmonisation of the two export licensing regimes. However, there was a concern that this 'window of opportunity' may not remain open for long, so an EU-US dialogue should take place as soon as practicable to avoid the risk of protectionism on either side of the Atlantic.

Panel 3. Political Transformation and National Approaches to Trans-Atlantic Acquisition

- Reconciling National Defence Industry Strategies and Priorities
- Fostering Change: Leadership, New Models and Stronger Institutions

Participants recognized that fostering change was a matter of national will and leadership in government and industry. The challenge was to ensure that the necessary transformation takes place, while recognising the political sensitivities involved. The establishment of a high level NATO Industry Board, bringing together the senior leadership of defence industry with NATO's political and military leadership, was seen as one way of focusing attention on the practical issues of trans-Atlantic Defence Industrial Co-operation to provide the capability and interoperability solutions needed for NATO operations. Such a board would need to relate appropriately to and reinforce the current NATO Industrial Advisory Group.

Panel 4. The Trans-Atlantic Defence Industrial Base – Continuity and Change

- Consolidation and Rationalisation in the Trans-Atlantic Industrial Base
- Market Access and Regulation: Trading on the Other Shore

With regard to consolidation and rationalisation of the Trans-Atlantic Industrial Base, it was apparent from the discussions that defence industries on both sides of the Atlantic, in their pursuit of markets and new technologies, have succeeded in developing business solutions to the regulatory problems presented, although these solutions tend to add cost and delays. Small and Medium sized companies (SME), which bring innovative technologies to the market, are at a disadvantage, but, with the right products, can find ways forward.

However, defence industrial leaders emphasized that market access and trading require government customers to invest in new programmes. In other words, without demand side impetus, there can be no supply side collaboration and no development of the industrial skills needed to sustain the defence industrial base.

In summary, the Conference view was that trans-Atlantic co-operation can and must be improved, as it is a keystone of the efficacy of the NATO alliance. Improvements will depend on actions. These must be taken promptly to capitalize on both the interest generated by the conference and the “window of opportunity” that exists today.

Introduction

Introduction

1. The Trans-Atlantic Defence Industrial Co-operation (TADIC) Conference, hosted jointly by the Conference of National Armaments Directors (CNAD) and the Royal United Services Institute (RUSI) on 15th and 16th October 2009 at NATO Headquarters, Brussels, sought solutions to improve government-industry defence technological and industrial cooperation to support NATO capability development and strengthen interoperability. Specifically the Conference looked at how to promote a strong and better integrated Defence Technology and Industry Base in North America and Europe.

2. This report comprises 2 volumes; Volume 1 provides a summary of the outcomes and key issues. Volume 2 provides a full report of the key note addresses and panel discussions, including Q&A sessions.

Background

- NATO Perspective:

3. Trans-Atlantic Defence Industrial Cooperation has been a subject of continuing importance for NATO. Heads of State and Government (HoSG) addressed the topic in the Istanbul Summit communiqué of 28 June 2004 and at the Bucharest Summit in April 2008. On the latter occasion HoSG noted that efforts to develop and field the right capabilities and forces, with the greatest practicable interoperability and standardisation, would be furthered by improving trans-Atlantic defence industrial cooperation, and agreed to improve trans-Atlantic defence technological and industrial cooperation.

4. In February 2008, the NATO Industrial Advisory Group (NIAG) delivered a study report to CNAD identifying measures that allied governments and defence industries could implement to improve Trans-Atlantic Defence Industrial Cooperation to support Alliance defence capability transformation.

5. Trans-Atlantic defence industrial cooperation involves a wide range of issues including national technology releasability policies, national market access policies and associated aspects, national defence industry strategies, including national preference restrictions and restrictions on foreign direct investment, and application of intellectual property rights.

6. Of specific relevance to CNAD is the ability to conduct information exchange amongst nations in NATO fora on technologies related to Alliance capabilities and to pursue cooperative armaments programmes. This is particularly important in the current environment where Alliance operations require rapid development and procurement of defence capabilities.

- RUSI Perspective:

7. From the broader political and economic perspective, the landscape for trans-Atlantic defence industrial co-operation is in the midst of a profound transformation, much of it centred on the new US administration. *Will President Obama's planned reforms truly open the American market to Western European countries competing for Pentagon purchases? Will defence procurement be*

characterized by better reciprocity, or will the pressures of the economic crisis undercut these efforts? Meanwhile, other nations also face significant changes to their procurement systems and defence spending priorities. If the US and Europe are to strengthen their defence industrial relationships in the context of an economic downturn, they will need new thinking and strategic dialogue to advance a collaborative agenda.

Conference Programme

8. The Conference was attended by 260 delegates, representing senior leadership from nations, NATO, European Union (EU), industry and academia. The event was sponsored by Charles River Associates, BAE Systems and Boeing.

9. The Conference began with a Dinner on the 15th October, during which Dr Ashton Carter, United States Under-Secretary of Defense for Acquisition, Technology and Logistics, delivered a key note address, followed by a short question and answer session. Dr Carter presented a candid view of the present trans-Atlantic co-operation arrangements from a US perspective and offered some thoughts to help seed the discussions during the main Conference. The summary of Dr Carter's address can be found in the next section of this report.

10. The main Conference event began on the 16th, with welcoming remarks from the co-hosts, Mr Peter Flory, Assistant Secretary General Defence Investment, HQ NATO and Professor Michael Clark, Director, Royal United Services Institute. This was followed by a key note address by Mr Håkan Jevrell, State Secretary to the Swedish Minister of Defence, which provided the Conference with a European view, from the perspective of the nation holding the EU Presidency then. The summary of this key note address and subsequent discussion can be found on the next page.

11. The major part of the Conference comprised four concurrent Panels, each under the direction of a Chairman and two moderators, addressing the following topic areas:

- Panel 1 – Defence Spending in the Lean Years and Preparation for Growth in 2010: Co-operative, Multinational Solutions?
- Panel 2 – Principles for Applying Restrictions on Technology Transfer : Protecting Technology, Enhancing Interoperability
- Panel 3 – Political Transformation and National Approaches to Trans-Atlantic Acquisition
- Panel 4 – The Trans-Atlantic Defence Industrial Base – Continuity and Change

12. To conclude, each of the Panel Chairmen presented the recommendations developed by their respective panels to the plenary, before the co-hosts made their closing remarks.

13. The Conference Programme is at Annex 1, the Key Note and Panel Speakers are listed at Annex 2 and the Conference participants are listed at Annex 3.

Key Note Addresses

Points from the Key Note Address to the Conference Dinner -15 October 2009

Dr Ashton Carter - Under-Secretary of Defense for Acquisition, Technology and Logistics

- More challenging for the Alliance at 28 rather than 16
- Transformation drives change
 - ▶ War means defence acquisition has to be more responsive and rapid
 - ▶ 10-15 year programmes still have their place
 - ▶ More programmes now with durations of months rather than years
- ISAF is a logistics war
 - ▶ Different infrastructure than Iraq
 - ▶ Everything that needs to be done depends on infrastructure
- Iraq withdrawal presents challenges
 - ▶ No luxury of withdrawal at own pace – as with First Gulf War
 - ▶ Working to tight schedule set by President Obama
 - ▶ Issues associated with withdrawal from a 'hostile' environment
- Contractor Support
 - ▶ For every soldier in theatre there is one contractor
 - ▶ Many different types and responsibilities
 - ▶ US did not fully appreciate the issue during First Gulf War
 - ▶ Not being managed well - so performance not what it should be
- Public Scrutiny
 - ▶ Much more public oversight – more commissions and visits by auditing teams
 - ▶ Need better balance of performance with taxpayer's money versus maintaining operational effectiveness
- Responsibilities of Armament Director not unique
 - ▶ No one fights alone
 - ▶ Value in solidarity but better to have the sum of the whole rather than the sum of the parts
 - ▶ Today must be more responsive to meet the short timelines for the support of ongoing campaigns
 - ▶ Modern war not by military aims alone but in concert with other departments
- Weapon System Acquisition Challenges
 - ▶ Everyone keen for acquisition reform
 - ▶ President and Sec of Def both interested
- Weapon Systems Acquisition Reform Act 2009
 - ▶ Opportunity to do better
 - ▶ Most advice on 'birthing' of programmes – need to be
 - Honest about cost
 - Not be over-ambitious – requirements creep
 - ▶ There is a stubbornness against change
 - ▶ Bound to make mistakes - no silver bullet
 - ▶ Programme closure decisions – equally important
 - Much less advice from Congress
 - Again President and Sec of Def both interested, when appropriate
- US Defence Spending
 - ▶ Expectation of continued real growth

- ▶ No more double digit growth as experienced after 9/11
 - ▶ Need to adapt management during this austere period
- Partnership between Government and Defence Industry
 - ▶ This Conference is about industry
 - ▶ Dependent on industry to deliver weapons systems
 - ▶ Not sure why dialogue is not as fruitful as in the past
 - ▶ Need to foster a better business environment
- Maintenance of a Defence Industrial Base valid
 - ▶ Skills base necessary to meet the National Security mission must be maintained
 - ▶ Not a job retention issue
- As environment changes so must industrial structure
 - ▶ How should change underpin national security
 - ▶ Big challenge to address industrial co-operation
 - ▶ Taxpayer interests - whole must be greater than sum of the parts
- CNAD focus on the smaller, more war related projects proving very effective
 - ▶ Smaller bites and shorter timeframes
 - ▶ Need to develop model further
 - ▶ Not without problems
 - Spending taxpayer's money – different views nation by nation
 - Not too easy to resolve
- Export Controls
 - ▶ Review underway to look at reform
 - Dual use weapons systems part
 - Especially sensitive activities
 - ▶ Are decisions made on an analytical basis or just by using a check-list?
 - ▶ Recognised a need for competent executors of the policy
- Need to learn how earlier in the life cycle of weapons system development to build in 'exportability'
- Share frustration that Industry faces with the Export Control processes
- Dialogue needed with European partners to ensure that a 'European island' is not created
- Strength and scope of our solidarity is remarkable a community built around a common security destiny
- Politically - the whole is much greater than the sum of the parts and in weapons system programmatic I would like to see the whole

Points from the Keynote Address to the Conference - 16 October 2009

Mr Håkan Jevrell – State Secretary to the Swedish Minister of Defence

- Trans-Atlantic relationship very important to Sweden and EU
 - ▶ Economically
 - ▶ Culturally
 - ▶ Technologically
 - ▶ Militarily
- Does not mean we have to agree on all issues but we are partners and need each other
- During past decade EU has participated in over 20 operations on 4 different continents
- Since Bosnia, NATO has taken over greater responsibility for providing peace and security
- Today the majority of NATO and EU nations face a significant challenge in Afghanistan
- NATO and EU's contribution to crisis management needed and much demanded
- The acquisition of the required equipment at the lowest possible cost is an integral part of our military capability
 - ▶ Direct relationship between operational needs and the functioning of the market
 - ▶ Need to find ways to strengthen our defence industrial bases and the links between us
- Article 296 give EU member states the right to make exemptions from the treaty for national security reasons
 - ▶ Exemption necessary for all sovereign states
 - ▶ Main factor behind the fragmentation of the European defence market
 - ▶ Initiatives by Commission and European Defence Agency (EDA) to improve the functioning of the defence materiel market
- EDA has only been in existence for five years but has achieved much
 - ▶ Code of Conduct on Defence Procurement, opening up markets for procurement within Article 296, major achievement during first year
 - ▶ This Summer, Code of Conduct on Offsets in place
 - ▶ European Defence Technology Industrial Base (EDTIB) Strategy from 2007 sets out the vision for many important industrial areas
- In 2007 the Commission launched its defence package comprising
 - ▶ Defence Industrial Strategy
 - ▶ Public Procurement Directive
 - ▶ Intra-Community Transfers Directive
 - ▶ Entered into force and will be implemented by the Member States
- The Directive on Defence Procurement contains new rules adapted to the special circumstances of defence
 - ▶ Allows greater flexibility in the award process
 - ▶ Contains special provisions for the security of supply and security of information
 - ▶ Applicable to sensitive contracts in the field of non-military security
- The Directive on Intra-Community Transfers of Defence Goods aims to facilitate the easier transfer of equipment within the EU by means of
 - ▶ Global and general licences
 - ▶ Certification of companies
- The 2 Directives, now under implementation by Member States, important milestones on the way towards a more open and competitive European defence market
- The Strategy being taken further by the Commission by a number of studies
 - ▶ "The nature and impact of barriers to trade with the US for European defence industries" - expected to be published soon
 - ▶ Other topics being studied include:

- Emerging markets
 - State control of strategic defence assets
 - Small and Medium Enterprises
- The Swedish Presidency has launched an initiative on transparency, harmonisation and an open market – referred to as ‘a level playing field’
- Competition in the global defence market getting tougher and the room for smaller players has diminished
 - ▶ Share of the 20 largest defence companies of the World’s market had increased to more than 70% in 2000
 - ▶ Only 1 of the largest 5 and 4 of the largest 10 companies are European, the rest are from the US
 - ▶ 90 of the top 100 companies are either from the US or Europe
 - ▶ US dominance is based on volume of defence spending
 - Procurement 3 times the combined spending of the EU
 - R&D 6 times that spent by the EU Member States
- Sweden has chosen a twin track approach to use the Presidency to strengthen the defence industrial base in Europe
 - ▶ Creation of a level playing field
 - ▶ Transparency and harmonisation
- The level playing field is recognised as a sensitive subject
 - ▶ Strong support of Defence Ministers at the informal EU ministerial meeting at Göteborg 2 weeks ago – areas highlighted
 - Small and Medium sized Enterprises
 - Security of Supply
 - Security of Information
 - Code of Conduct on Defence Procurement and Offsets
 - State aid and ownership
- EDA to draft a political declaration on the Level Playing Field for presentation to the EDA Steering Board in the December 2009 Ministers format
- Reasons for highlighting transparency and harmonisation
 - ▶ Can be started immediately
 - ▶ Can take positive action in fields not only related to procurement but all aspect of EDA’s work, such as
 - Capability Development Plan
 - Implementation of European chemical directive REACH
 - Military airworthiness
- Transparency
 - ▶ Can be the first step towards an open market
 - ▶ May or may not be followed by harmonisation
 - ▶ Makes it easier for countries to co-operate
 - ▶ Is a foundation for building trust between countries
- Harmonisation
 - ▶ More difficult subject
 - ▶ Means you have to change the way you work
 - ▶ Essential in the long term
 - ▶ Most practical way to begin with new areas – no historical commitments or bindings
 - ▶ European harmonisation of military airworthiness requirements is an example
- Work towards a level playing field not only applicable in Europe
- Trans-Atlantic co-operation should also build on transparency, harmonisation and openness
- EU and US are partners but not equal partners for the reasons already stated

- Swedish initiative for an open European defence market is also a strategic decision to create the right conditions for European industry to compete in the global arena
 - ▶ This means competing with the US industry but with the aim of providing better capabilities for the US Armed Forces to help complete their international missions
- The US and Europe are both dependent on each other for technology and materiel
 - ▶ Ratio of US imports from and US exports to Europe traditionally as high as 1:4
 - ▶ In last five years that ration has fallen to 1:2
 - ▶ During same period the volume of trans-Atlantic defence flow has increased by 60%
 - ▶ Defence exports to US have doubled to reach \$2.2B in 2008
- If US seeks competent coalition partners in the field they also need strong R&D partners
- Need to find ways of connecting our industries to
 - ▶ Promote healthy competitiveness within the market
 - ▶ Increase level of interoperability between US and EU systems
- EU intention is not to build a 'Fortress Europe'
 - ▶ We are competitors but we are also partners
 - ▶ The partnership has to be built on openness, transparency and harmonisation
- The EDA has entered into co-operation with the US DoD on a number of topics
 - ▶ Future transport helicopters
 - ▶ Harmonisation of software defined radios
 - ▶ Insertion of UAVs into general air traffic
- Need for US and EU to develop this co-operation further to increase harmonisation and transparency in the defence market
 - ▶ Not only from a EU-US perspective but also in the context of EU-NATO relations
- This Conference should also identify what other actions can be taken to improve the transparency and harmonisation
- For a long time it has been recognised that the European defence industrial base and market is fragmented
 - ▶ Now is the opportunity to do something about it
- Every extra Dollar/Krona/Euro spent because of market inefficiencies could have been more usefully spent on another programme

Panel Chairmen's Summary Reports

Panel 1 - Defence Spending in the Lean Years and Preparation for Growth in 2010: Co-operative, Multinational Solutions?

Chairman: **Vice Adm Dino Nascetti, Director General Naval Armaments, Ministry of Defence, Italy, National/NATO**

Concluding Recommendations:

- Encourage all parties to consider technology transfer and interoperability as design features during the early stage of development of a new equipment/system
- More effective use should be made of the expertise in the NATO Main Armaments Groups (MAGs) to address short term issues
- Develop a better understanding of where responsibilities and expertise lie between NATO and EU

Summary of main points of Discussions:

- **European defence procurement processes being changed**
 - ▶ Document to nations in August 09 for implementation by 2011
 - ▶ Invited EU officials to liaise with US counterparts as US review of processes is under way
 - ▶ Information exchange essential at this time between politicians
- **Lots of duplication between NATO and EU**
 - ▶ Rationalisation necessary within EU before entering into detailed dialogue with the US
 - ▶ Policy needed to reduce overlapping areas.
 - ▶ 89 defence projects in progress in EU whereas only 29 in US
 - ▶ On subject of Border Control - EU has 14 projects – much smaller number in the US
- **How free are the nations to proceed with multinational and bi-lateral co-operation?**
 - ▶ Although declared as a policy by nations, difficult to implement because of national interest both in government and industry
- **Trans-Atlantic co-operation with many nations involved**
 - ▶ Cost share – work share – technology transfer
 - ▶ Difficult to agree work share - financial and quality
 - ▶ All partners want share of high-end as well as low-end technology
- **Procurement through NATO Agencies an advantage**
 - ▶ De-links from national issues
 - ▶ Simplifies the process

- **NATO/NAMSA supporting the operations in Afghanistan**
 - ▶ Need for more rapid acquisition of capability
 - ▶ Build in interoperability from beginning of project
- **Life Cycle Support**
 - ▶ Need to address Logistics Support at same time as acquisition
 - ▶ Offers more opportunity for smaller nations to participate
- **Commercial-off-the-Shelf**
 - ▶ COTS is an option for more rapid procurement
 - ▶ Nations need to be willing to purchase from abroad
 - ▶ Needs to be some method for compensation for overseas procurement
- **Main Armaments Groups (MAGS)**
 - ▶ Offer some valuable capability that can support short term requirements
 - ▶ Have shaped co-operation in the past
 - ▶ Need to make better use of this resource in the future
- **Capability for system to be modernised**
 - ▶ Key for flexibility and to accommodate technology updates
 - ▶ Modularity – basic design then enhancements to meet national requirements
- **Involvement of NAMSA and other Agencies**
 - ▶ Proven logistic support for ongoing NATO operations
 - ▶ Wide use of contractors
 - ▶ Agencies capability need to be better exploited
- **Multinational Co-operation**
 - ▶ Requires nations to agree operational requirements
 - ▶ Cannot be driven by industrial interests
 - ▶ Co-operation between European nations and US necessary for successful multinational project

Panel 2 - Principles for Applying Restrictions on Technology Transfer: Protecting Technology, Enhancing Interoperability

Chairman: **IGA Patrick Fermier**, Deputy Director for Export Control, Délégation Générale pour l'Armement (FR)

Concluding Recommendations:

- EU and US should enter into a dialogue on Export Controls
- A study be conducted on a methodology to determine the differences between a critical technology and a critical capability
- Develop a training programme for executors of export control procedures to ensure a common understanding of the export control processes
- Develop a common glossary of Export Control terms
- Conduct a survey to determine the impact on capability gaps and the impact on Coalition interoperability from extant Export Control processes
- TADIC Conference should be repeated annually in order to monitor progress and provide a forum for the development of innovative ideas to improve trans-Atlantic co-operation

Summary of main points of Discussions:

- **Annual TADIC Conference**
 - ▶ Considered worthwhile to have conference each year to track implementation of actions/recommendations
- **Common Understanding**
 - ▶ Need to broaden understanding of various export control systems
- **Interoperability**
 - ▶ Common equipment not necessary to be interoperable, but more important to implement technology & equipment in such a way as to enable communications and the exchange of information
- **Technology**
 - ▶ Technology gap was not considered an issue but the capacity provided by nations and wiliness to invest in certain areas was important
 - ▶ Some situations where technology transfer is not the issue but rather a matter of national will and cost (i.e. special forces in Afghanistan).
 - ▶ Foreign and security policy as an integral part of technology transfer decisions in the US (not just a technical and economic issue)
 - ▶ Difficult technology decisions need to happen with appropriate expertise to review them
- **Export Control**
 - ▶ Working with allies is important and in terms of export control US should explore specific de-regulation with EU

- **Co-operation**
 - ▶ Co-operation is a culture (not just an environment to buy and sell), co-operating with right attitude and commitment is seen as essential
- **R&D**
 - ▶ Increasing R&D funding is not a viable option for nations that do not require a defence industrial base and choose to purchase defence items from global companies

Panel 3 - Political Transformation and National Approaches to Trans-Atlantic Acquisition

Chairman: **Mr Robert Bell**, Senior Vice President, SAIC (US)

Concluding Recommendations:

- Applaud the recent Solana directive to the EDA to identify with the US “concrete opportunities” for trans-Atlantic partnership
- Encourage participating EU Member States to authorize EDA to establish co-operative partnership through administrative arrangements with all NATO member States
- Urge EU Member States to constructively and consistently implement the new EU Directives on Intra-EU Arms Transfers
- Urge the new US Administration to set ambitious goals, consistent with national security requirements, for the Export Control Review recently ordered by President Obama, and actively engage NATO in a dialogue on the subject
- Urge prompt ratification by the US Senate of the pending US/UK Defence Trade Co-operation Treaty and recommend the Administration begin a careful sequence of negotiating similar treaties with other key US Allies, particularly those engaged with the US and UK in combat operations in Afghanistan
- Recommend the NATO military structure and NATO civilian agencies together consider how best to provide industry with earlier notice of emerging contract opportunities related to Crisis Response Operations (CRO) Urgent Requirements (CURs) emanating from Alliance Operational Missions
- Recommend NATO Member States consider how to adopt greater use of Best Value Procurement methods for contract competitions related to CRU emanating from Alliance Operational Missions
- Support the work recently endorsed by NAC to look at all options for balancing NATO’s own resources and requirements, taking account of both long-term and short-term needs.
- Recommend careful review of recent recommendations from the NATO Staff Working Group on Interoperability (SWG1) and the NIAG regarding how best to enhance NATO interoperability and standardization to the greatest extent practicable, including greater reliance on open standards and “plug-and-play” architectures, and closer consideration of interoperability criteria by the Military Committee when it approves Capability Packages.

Summary of main points of Discussions:

- **What is Control and how does it impact**
 - ▶ Critical for weapons of mass destruction
 - ▶ Has a cost
 - ▶ Delays programmes
 - ▶ Consequence on sovereignty of other countries
 - ▶ Re-exportability implications

- **Impact of EU and US Initiatives**
 - ▶ ITAR (US) versus EC (EU) reviews seem to be running in parallel with no cross fertilisation
 - ▶ Fear about risk of 'Fortress Europe' and/or similar protectionism in US
 - ▶ There are also 'close' and 'not so close Allies'
 - ▶ Level Playing Field/transparency will not be achieved if the 2 initiatives continue in parallel

- **Modification of Export Control Procedures**
 - ▶ Must not undermine the existing regimes such as WASSENAAR (dual use goods and munitions) and MCTR (Missile Technology Control Regime).

Panel 4 – The Trans-Atlantic Defence Industrial Base – Continuity and Change

Chairman: **Mr Edgar Buckley**, Senior Vice President, Thales (UK)

Concluding Recommendations:

- TADIC should be an item on NATO's agenda
- NATO should promote efforts to reform export control regulations to facilitate as free as possible flow of technology between Allies
- NATO should call for Allies urgently to facilitate technology discussions amongst Allies in support of NATO Interoperability
- NATO should create an Industry Board for top-level dialogue between Sec Gen and SCs on one side and Industry CEOs on the other

Summary of main points of Discussions:

- **Business outlook bleak**
 - ▶ Budgets reducing
 - ▶ 2 years' pain ahead of us
- **To survive, Industry will follow the money**
 - ▶ But this will not necessarily retain all capabilities/technologies in all home markets
 - ▶ No supply-side collaboration without demand - needs government investment through programmes.
- **From a business standpoint, no difficulty accessing US market, and vice-versa, through Mergers and Acquisitions (M&A) and teaming**
 - ▶ for example Finmeccanica and Cobham
 - ▶ Service Supply Agreements (SSA) useful for enabling business in US
 - ▶ Trans-Atlantic teaming is common for major programme start-ups
- **But technology transfer is more constrained**
 - ▶ Some say for understandable reasons
 - ▶ Effects are unfortunate for co-operation, long-term sustainability and interoperability
- **Concern for health of European Defence Industrial Base, which is key for sustaining effective long term European defence contribution**
 - ▶ More consolidation would be beneficial (Naval and Land sectors)
 - ▶ 'Fortress Europe' is not an option
 - ▶ Real need is for more investment/programme start-ups
- **Limited prospects for increased co-operation**
 - ▶ Indeed risk of protectionism, despite long-term disadvantages

- ▶ Investment is best form of protection
- **NATO has a locus, a responsibility, a role:**
 - ▶ Industry is a capability
 - ▶ Co-operation is key to interoperability
 - ▶ NATO (through its Agencies) is itself a customer
- **And we currently have a window of opportunity:**
 - ▶ President Obama review
 - ▶ UK Defence Industrial Strategy
 - ▶ EU Defence Package taking effect

Post Panel Reports – Discussions

Points raised in the follow-on discussion included:

- Panel 4 recommendation to create a NATO Industry Board for top-level dialogue between the Secretary General and Strategic Commanders and Industry CEOs. It was proposed that the existing NATO Industrial Advisory Group (NIAG) was an appropriate mechanism that could be employed for this. Rather than undermine the NIAG with another “board”, the aim would be to create the NIAG at CEO level, that is a “reinforced NIAG”. It was noted that this proposal was similar to an idea to create a trans-Atlantic defence industry dialogue modelled on the trans-Atlantic business dialogue. It was also similar in aspiration to the National Defence Industries Council in the United Kingdom and the Defence Science Board and Defence Industry Board in the United States.
- the benefits of Off the shelf (OTS) procurement approaches from the point of reducing development costs, noting that OTS may only give the 80% solution to the capability requirement. However, it was also noted that increasingly time is of the essence to get capability and 80% could be better than zero.
- the proposal coming from the four panels that a follow-on conference, or conferences, would be useful. Here it was noted that ongoing export control reforms and budgetary issues should lead to useful topics for a next conference.

Co-Chairmen Closing Statements

Professor Michael Clark

- Conference demonstrates what can be achieved by NATO, a Think Tank and Commercial Backers

Observations

- ▶ Agree on context that public spending on defence will be tight
- ▶ Also context that political appetite in Europe is not there – squeeze on public expenditure
- ▶ NATO reform underway – Strategic Concept to be re-written
- ▶ Duplication – Hard problem to tackle - Some things will need to be dropped
- ▶ Baroque processes which make life difficult for SMEs to engage
- ▶ Need to be very selective over what to engage in
- ▶ Anything designed now will have to be in service in 40 years time
 - 10 years to develop and 30 years in service
- ▶ Whole procurement system very risk averse
 - need to change the management of risk
 - live with taking greater risk in the acquisition process
- ▶ If there is to be greater co-operation with the US there needs to be a more coherent position in Europe
- ▶ Creation of a level playing field is a never ending task.
- ▶ What creates pressure for export controls and ITAR within the process is

- Politics
- Technical innovation
- ▶ Technical innovation creates
 - A requirement to identify new ways of delivering interoperability
 - New ways of creating a level playing field when the emerging technology changes and frustrates the character of the problem we thought we were dealing with.
- ▶ Processes can be sclerotic and can be self veto but you can't do without them
 - Somehow need to convert processes into a permissive framework for taking action
 - Easy to say hard to do
- ▶ Live in midst of op imperative - severe testing ground
- ▶ Still old assumption that if we scale up for full scale war we can scale down and do everything else.
 - Intellectually we know that is not the case but institutionally we do not know it.
 - When we do the lesser jobs it has to be recognised that Peace Support involves a lot of high tempo combat. Getting balance right is much harder than just appreciating it intellectually
- ▶ Capabilities rather than technologies should be focus
- ▶ High end sensitive technologies can only be procured via co-operative frameworks in Europe due to affordability
- ▶ The more sensitive technologies are the ones in which all of the problems of the trans-Atlantic co-operation are at their most acute.
- ▶ The future investment in more C4ISTAR capability will mean dealing increasingly with the more sensitive technologies
- ▶ Broader point – integration of mil and civil technologies.
 - The number of genuinely military technologies are limited – ordinance, rocketry, stealth technology and passive sensors
 - List relatively short with many of the other technologies such as propulsion, transport, aerospace, communications and computers are essentially civil technologies
 - The 'weaponeer' has to adapt and personalise these civilian technologies to meet the requirements for military applications.
- ▶ In the future will become more difficult to operate the baroque system of controls
 - Time is not on our side
 - Have to address the process issue which is predominantly political
 - Opportunity is with us for the next few years but after that it may never be possible to get it right
 - Urgency to understand the issue and this Conference has been the first step in that process.

Mr Peter Flory

- ▶ Reminded of the statement of Secretary Gates quoted by Dr Ashton Carter
 - "Make sure your part of the building remembers that we are at war"
- ▶ Urged that when the export control and technology transfer processes were being revised that the operational imperative was considered
 - Particularly, as NATO had soldiers at war whose lives depended on NATO providing the necessary capabilities to enable them to complete their mission and return home safely
- ▶ Risk management against a backdrop that we were at war

- ▶ Trans-Atlantic Defence Industrial Cooperation spans a wide range of issues that cross many national government departments and international arrangements. This made arranging this Conference under the CNAD difficult because Armament Directors are not responsible for many of these issues back in their Capitals. However as Armament Directors are probably the most affected by these issues, it was agreed as appropriate for CNAD to host the Conference.
- ▶ Where do we go from here? Noted consensus for a follow-on Conference in a year's time. We will produce a report to present the issues raised today and based on this report I will propose to the Secretary General that a brief be given to the Council on the Conference outcomes.
- ▶ In presenting the conference recommendations we will note those recommendations for nations that are outside the remit of NATO ambassadors and those topics which NATO might take the lead. The Council responses will dictate how the issues are moved forward.

Summary of Recommendations Arising and Proposals for Follow-on Activities

Summary of Recommendations Arising

1. The recommendations have been collated into a tabular form to aid the staffing of any follow-up actions.

No.	Originating TADIC Conference Panel	Recommendation	Offered to:	Remarks
1	1	Encourage all parties to consider technology transfer and interoperability as design features during the early stage of development of a new equipment/system	CNAD	Need to involve the NC3B as the NATO focus for C3 systems
2	1	More effective use should be made of the expertise in the MAGs to address short term issues	CNAD	Defence Investment Division lead to develop proposals for better utilisation of expertise
3	1	Develop a better understanding of where responsibilities and expertise lie between NATO and EU	CNAD	Need to map responsibilities between NATO and EU to minimize duplication, recognising any extant political obstacles
4	2	EU and US should enter into a dialogue on Export Controls	Nations	Need to identify US/EU leads? Include as recommendation in ASG DI briefing to NAC
5	2	A study be conducted on a methodology to determine the differences between a critical technology and a critical capability	NIAG	Should be a relatively short and straightforward study
6	2	Develop training programmes for executors of export control procedures to ensure a common understanding of the export control processes	Nations	Need to identify US/EU leads and then determine who is best placed to develop a training programme
7	2	Develop a common glossary of Export Control terms	Nations NIAG	as above

8	1,2,3,4	TADIC Conference repeated annually in order to monitor progress and provide a forum for the development of innovative ideas to improve trans-Atlantic co-operation	CNAD	Defence Investment Division lead
9	2	Conduct a survey to determine the impact on capability gaps and the impact on Coalition interoperability from extant Export Control processes	NIAG	There is a need to quantify the true impact of Export Control processes on capability gaps and coalition interoperability in order to support case for improved TADIC
10	3	Support the recent Solana directive to the EDA to identify with the US "concrete opportunities" for trans-Atlantic partnership	Nations	Include as recommendation in ASG DI briefing to NAC
11	3	Encourage participating EU Member States to authorize EDA to establish co-operative partnership through administrative arrangements with all NATO member States	Nations	Include as recommendation in ASG DI briefing to NAC
12	1 & 3	Support all parties giving renewed priority to broadening and deepening of formal NATO-EU co-operation on defence matters by overcoming the long-standing political disputes blocking such a co-operation	Nations	Include as recommendation in ASG DI briefing to NAC
13	3	Urge EU Member States to constructively and consistently implement the new EU Directives on Intra-EU Arms Transfers	Nations	Include as recommendation in ASG DI briefing to NAC
14	3	Urge the new US Administration to set ambitious goals, consistent with national security requirements, for the Export Control Review, recently ordered by President Obama, and actively engage NATO in a dialogue on the subject	Nations	Include as recommendation in ASG DI briefing to NAC

15	3	Urge ratification by the US Senate of the pending US/UK Defence Trade Co-operation Treaty and recommend the Administration begin a careful sequence of negotiating similar treaties with other key US Allies, particularly those engaged with the US and UK in combat operations in Afghanistan	Nations	Include as recommendation in ASG DI briefing to NAC
16	3	Provide industry with earlier notice of emerging contract opportunities related to CRO Urgent Requirements emanating from Alliance Operational Missions	DI/IMS	Defence Investment and Military staff to advise involved NATO bodies
17	3	Recommend NATO nations consider how to adopt greater use of Best Value Procurement methods for contract competitions related to CRO Urgent Requirements emanating from Alliance Operational Missions	Nations	To note that Best Value is being taken forward in NATO following the recent SRB/IC trial of 'best value' bid evaluation for all future International Calls for Bid (ICBs)
19	3	Support the work recently endorsed by NAC to look at all options for balancing NATO's own resources and requirements, taking account of both long-term and short-term needs.	CNAD	
20	3	Recommend careful review of recent recommendations from the NATO Staff Working Group on Interoperability and the NIAG regarding how best to enhance NATO interoperability and standardization to the greatest extent practicable, including greater reliance on open standards and "plug-and-play" architectures, and closer consideration of interoperability criteria by the Military Committee when it approves Capability Packages.	DI and NATO Committees concerned	NCS, CNAD, NC3B may have a view here.

21	3	Must endeavour to avoid 'Fortress America' or 'Fortress Europe' by limiting preferential policies to the minimum consistent with essential national security and sovereignty and by eliminating to the greatest extent practicable all barriers to enhanced trans-Atlantic Defence Industrial Cooperation and enhanced interoperability of Allies engaged in on-going CROs.	Nations	Include as recommendation in ASG DI briefing to NAC
22	3	We urge EU Member States to constructively and consistently implement the new Directive on Defence Procurement	EU Nations	Include as recommendation in ASG DI briefing to NAC
23	4	TADIC should be an item on NATO's agenda	Nations	Include as recommendation in ASG DI briefing to NAC Propose inclusion of TADIC in the new Strategic Concept during its drafting stage
24	4	NATO should promote efforts to reform export control regulations to facilitate as free as possible flow of technology between Allies	Nations	Although NADs are not responsibility for Export Control processes the defence acquisition community are those most impacted by the processes. Linked to Recommendation 1
25	4	NATO should call for Allies urgently to facilitate technology discussions amongst Allies in support of NATO Interoperability	Nations	Include as recommendation in ASG DI briefing to NAC
26	4	NATO should create a NATO Industry forum where the senior leadership of industry could engage with NATO's senior political and military leadership on a formal basis.	CNAD	NIAG to develop proposals 'Reinforced NIAG' could be a construct to provide this senior NATO Industry forum.

Proposals for NATO Industrial Advisory Group (NIAG) Follow-on Study/Analysis

1. The NIAG is well placed to assist in the development of some of the proposals that have come from the 2009 TADIC Conference.
2. **NATO Industry Board**. It was agreed that Industry now played a much greater part in the delivery and maintenance of NATO's military capability, particularly in support of Alliance operations where it is recognised that for every soldier deployed in theatre there was also a civilian contractor deployed in support. Industry should now be considered as a capability in its own right. The proposal to create a NATO Industry Board, potentially a "reinforced NIAG", where the senior leadership of industry could engage with NATO's senior political and military leadership on a more formal footing, offered significant benefits for the Alliance. This proposal needed to be developed further and a NIAG study should be initiated to examine possible constructs and TORs for such a body.
3. **Glossary of Export Control Terms**. A common understanding of the terms used with regard to export control procedures was seen as a key element in the harmonisation of trans-Atlantic defence industrial co-operation. The NIAG should initiate an analysis of the procedures with the aim of developing a Glossary of Terms used in export control processes.
4. **Survey on Impact of Export Control Processes**. There is a need to quantify the impact of export control processes on Alliance capability gaps and interoperability. The NIAG should initiate a survey to identify specific instances where export control processes have prolonged capability gaps and/or impacted on Alliance interoperability. The results of this survey should then be used to prepare a report which could provide a valuable input to the US and EU export control harmonisation effort.
5. **Critical Technology versus Critical Capability**. There is a need to develop a methodology to determine the differences between a critical technology and a critical capability. A NIAG study group should examine this issue and prepare a report.

Proposals for a Follow-on Conference

1. The unanimous view of the Conference was that the event had been a success, bringing together senior level representatives from a broad cross section of nations, NATO, the EU, industry and various other agencies involved in the acquisition of military capability. Although the majority of the Conference delegates were not directly involved in the execution of export control procedures, many had been impacted by the application of the present procedures and saw the development of a more fruitful trans-Atlantic dialogue as being a key enabler for more effective industrial and technological co-operation.

2. Each of the four Conference Panels echoed strong support for a follow-on conference and suggested that the TADIC Conference should become an annual event. The Conference was seen as providing a useful forum at which TADIC issues could be raised, discussed and innovative proposals developed. These proposals could then be staffed through the appropriate channels with the intention to further improve trans-Atlantic co-operation. The Conference could serve a number of purposes:

- Providing a forum for the informal discussion of TADIC issues
- Developing topics for the North Atlantic Council & Military Committee
- Providing input to the NATO Industry Board (*if established*)
- Providing a follow-up on previous Conference recommendations
- Informing participants on other TADIC developments
- Informing participants of changes to export control procedures

3. During the next 12 months, progress with the implementation of the EU directive on European cross-border armaments trade and the US review of the ITAR processes should provide some useful material for consideration at a follow-on conference next year. It is therefore proposed that the next TADIC Conference should be held a year's time.

Conclusions

1. The 2009 TADIC Conference was attended by over 260 delegates representing a broad cross section of senior level stakeholders from nations, NATO, the EU, industry and academia. The general consensus was that the Conference provided a useful forum in which the issues relating to trans-Atlantic co-operation, in particular with regard to technological transfer and export control processes, could be discussed. The US and EU perspectives of the challenges of trans-Atlantic co-operations were presented in key note addresses by Mr Ashton Carter (US Under-Secretary of Defense for Acquisition, Technology and Logistics) and Mr Håkan Jevrell (State Secretary to the Swedish Minister of Defence). This provided a useful backdrop for the remainder of the Conference that was conducted in four panel sessions.

2. There was agreement on the need for closer US and EU trans-Atlantic co-operation and it was accepted that this improved co-operation would inevitably result in more technologically advanced military capabilities being delivered to support both NATO and EU forces currently engaged in very demanding missions in several challenging operational theatres.

3. The introduction of the directive on EU cross-border arms trade was expected to create a more 'level playing field' for intra-EU defence industry co-operation and this transformation of the EU defence market was seen as an important pre-requisite for any significant change in trans-Atlantic co-operation between the EU and US. Moreover, the ongoing review of US export control processes was recognised as offering a window of opportunity for greater harmonisation of the EU and US procedures. This harmonisation would lead to the creation of an environment where technological transfer could thrive for the benefit of all parties concerned, thereby maintaining a sound defence industrial base in what was seen as a very competitive and financially stressful period.

4. In the area of R&D it was recognised that there were significant differences in the level of investment between the US and Europe, however, technological developments underway in Europe were seen to offer benefits to the US and visa versa. The relaxation of the present regulations would foster more effective technology exchange without imposing an unacceptable risk to national security. In a period of takeovers and acquisitions, the role of SMEs was seen as being an important element of the defence industrial base and improved trans-Atlantic co-operation would enable SMEs to thrive in what was a very competitive market place.

5. It was agreed that there was a need to gain a better understanding of export control processes and their effects. A training course for executors of export control procedures and the development of a glossary of export control terms were seen as two activities that could help in this regard.

6. It was agreed that every possible effort should be taken to facilitate and encourage active dialogue between the EU and US with regard to trans-Atlantic co-operation and the harmonisation of the export control procedures on both sides of the Atlantic. In this austere period it was seen as essential to avoid any form of protectionism or the creation of a 'Fortress America' or 'Fortress Europe' and more open and transparent trans-Atlantic co-operation would help to prevent this.

7. A number of recommendations were developed during the Conference and it was agreed that the relevant authorities should be encouraged to consider the recommendations and take the appropriate action. In some instances this would require NAC involvement but for other recommendations NATO committees and agencies could be invited to initiate the necessary actions.

It was also agreed that Industry had a more significant role to play in the development and delivery of future military capability and the benefits of establishing a NATO Industry Board were recognised. This proposal now needed to be developed further and it was suggested that the NIAG could provide the catalyst for this NATO Industry Board initiative.

8. Finally, there was unanimous support for the TADIC Conference to become an annual event to provide a forum in which the progress of the transformation of trans-Atlantic co-operation could be monitored and innovative proposals to further enhance defence industrial co-operation could be discussed and developed.

Recommendation

1. The Conference recommends that:
 - The detailed recommendations developed at the Conference be reviewed and addressed, as appropriate, in NATO, nations and industry;
 - The introduction of the EU directive on EU cross-border arms trade and the ongoing review of US export control processes be recognised as offering a 'window of opportunity' for greater harmonisation of the EU and US procedures;
 - The North Atlantic Council be advised on the outcome of the Conference and on the areas where NATO nations may best contribute to the improvement of trans-Atlantic defence industrial cooperation;
 - Consideration be given to the proposal to instigate a forum where the senior leadership of industry could engage with NATO's senior political and military leadership on a more formal footing, potentially though convening the existing NATO Industry Advisory Group at a 'reinforced' level;
 - A follow-on Conference be arranged in one years time.

Challenges and Opportunities in Trans-Atlantic Defence Industrial Co-operation

Co-organised by the NATO Defence Investment Division and the Royal United Services Institute
15-16 October 2009, NATO Headquarters, Brussels

15 October 2009

1815 – 1900 Registration

1900 - 2200 Opening Dinner, NATO Restaurant

Speaker: Dr Ashton Carter, **United States Under-Secretary of Defense for Acquisition, Technology and Logistics**

(Dinner jointly hosted by Charles River Associates and BAE Systems)

16 October 2009

0800 - 0900 Registration

0900 - 0920 Welcome Remarks

Mr Peter C. W. Flory, Assistant Secretary General Defence Investment
Professor Michael Clarke, Director, Royal United Services Institute

0920 - 0950 Keynote Address

Mr Håkan Jevrell, State Secretary to the Swedish Minister of Defence

0950 - 1015 Morning Break, Coffee and Tea

1015 - 1545 Breakout Panel Sessions One - Four: Details below
(Lunch sessions hosted by Boeing)

1545 - 1600 Afternoon Break, Coffee and Tea

1600 - 1730 Plenary Session: Panel Chairmen Reports and Discussion

Vice Adm Dino Nascetti, (Italy) Director General Naval Armaments, Ministry of Defence, Italy, National/NATO

IGA Patrick Fermier, (France) Deputy Director for Export Control, Délégation Générale pour l'Armement

Mr Robert Bell, (United States) Senior Vice President, SAIC

Mr Edgar Buckley, (United Kingdom) Senior Vice President, Thales (UK)

1730 Closing Reception, NATO Salon des Ambassadeurs

PANEL ONE: Defence Spending in the Lean Years and Preparation for Growth
in 2010: Co-operative, Multinational Solutions?

This panel will address the challenges associated with the financial crisis, its impact on defence spending and the rationales for encouraging multinational approaches in the context of a prospective upturn in 2010. Specific case studies will be introduced to enrich the debate. The panel will aim to generate industrial and policy solutions while taking account of the lessons learnt from previous experience.

Chair: V Adm Dino Nascetti, (Italy) Director General Naval Armaments, Ministry of Defence, Italy, National/NATO

Venue: Luns Conference Room

1045 – 1215 *Preparing for the Economic Downturn: Efficiency and Effectiveness*

- **What is the impact of the financial crisis on trans-Atlantic co-operation? Is it impeding or fostering closer relations?**
- **How does defence spending measure up against national priorities across the alliance? What is the impact on European relations with the US?**
- **How have national security budget constraints affected the nations' defence spending mix? How can we promote increased efficiency and effectiveness?**

Moderator: Mr. Richard Froh (Canada), NATO's Deputy Assistant Secretary General for Armaments

Speakers:

IGA Jacques Levet, (France) Assistant Deputy Chief of Staff for Plans and Programs, Etat-major de l'Armee de Terre and Armaments, and Chairman NAAG

Mr John Neri, (Canada) Director General, International and Industry Programs, Department of National Defence, and Chairman, NATO AGS Steering Committee

1215 – 1315 Buffet lunch will be served in the NATO Restaurant (*Lunch hosted by Boeing*)

1315 – 1545 *National Strategies, Multinational Solutions: The Way Forward?*

- **What part does defence play in wider national security debates in NATO and across the Atlantic?**
- **How have the imperatives of current operations affected planning for long-term defence capability investments?**
- **Are there opportunities for collaborative approaches to capability ownership and what is the rationale (value proposition) for multi-national procurement?**

Moderator: Adm (Retd) Norman Ray, (United States) Member of the Navy and International Business Divisions, The Spectrum Group

Speakers:

Mr Lucas Josten, (Germany), Policy Advisor representing Count Lambsdorff, (EU MEP, Sub-Committee for Security & Defence)

Major General (Retd) David Shouesmith, (United Kingdom), PRTM Consulting

PANEL TWO: Principles for Applying Restrictions on Technology Transfer:
Protecting Technology, Enhancing Interoperability

This section raises the question of identifying the appropriate balance between nations' interests in protecting sensitive technologies while also achieving greater interoperability among NATO forces. The panel will discuss innovative approaches to balancing risk and effectiveness.

Chair : IGA Patrick Fermier, (France) Deputy Director for Export Control, Délégation Générale pour l'Armement

Venue: Brosio Conference Room

1045 – 1215 *Sensitive Risks in Balance: Reforming Technology Transfer Processes*

- **What is the right balance between protection for sensitive technologies and fostering seamless interoperability in theatre?**
- **How can technology transfer restrictions be reformed to improve trans-Atlantic collaboration without compromising national security?**
- **How can efforts to reform technology transfer processes improve trans-Atlantic defence industrial co-operation while enhancing interoperability?**

Moderator: Mr Michael Rosenberg, (United States), Policy Directorate, Deputy Under Secretary of Defence for Technology Security Policy

Speakers:

Mr Jeff Bialos, (United States), Partner, Sutherland, Asbill & Brennan, Washington D.C

Mr Pierre Arnaud Lotton, (France), Expert, European Commission

1215 – 1315 Buffet lunch will be served in the NATO Restaurant (*Lunch hosted by Boeing*)

1315 – 1545 *The Technology Gap and its Impact on Military and Industrial Co-operation*

- **What are the benefits of technology transfer, over and above NATO interoperability?**
- **What is the impact of the trans-Atlantic technology gap on current (and future) military operations?**
- **What (more) can be done by the main R&D investing nations to align national, trans-Atlantic and Alliance imperatives?**

Moderator: Mr Christopher Codner, Director Military Services, RUSI

Speakers:

Mr Mark Clark (United States), Vice President, Raytheon International

Col Jan-Erik Lovgren (Sweden), Deputy Director General, Swedish Agency for Non-proliferation and export controls

Mr Al Volkman (United States), Director, International Co-operation Office of the US Under-Secretary of Defence for AT&L

PANEL THREE: Political Transformation and National Approaches to Trans-Atlantic Acquisition

This panel will address national acquisition strategies, their rationale and their impact on trans-Atlantic co-operation. Bridging industrial and policy concerns, this panel will explore the implications of national preferences and ways to foster solutions that bridge national and alliance-wide preferences.

Chair: Mr. Robert Bell, Senior Vice President, SAIC (US)

Venue: Conference Room 18

1045 – 1315 *Reconciling National Defence Industrial Strategies and Priorities*

- **What lessons can be learned from US and European approaches to acquisition to improve effectiveness of US-European co-operation?**
- **How do we reconcile disparate national defence industrial strategies with achieving co-operation and military interoperability?**
- **How can the combined investment in technology development in the US and Europe be better leveraged to the mutual benefit of our armed forces and our defence industries?**

Moderator: Dr Gunnar Hult (Sweden), Chief Scientist FMV, Dep National Armaments Directorate

Speakers:

Mr Leif Lindbäck (Norway), Norwegian MoD, NAD

Prof Trevor Taylor (United Kingdom), Research Fellow, RUSI

Ms Catalina Teodorescu, (Romania), Defence Resources Management Directorate, MoD

1315 – 1415 Buffet lunch will be served in the NATO Restaurant (*Lunch hosted by Boeing*)

1415 – 1545 *Fostering Change: Leadership, New Models and Stronger Institutions*

- **How can institutions such as NATO, the EU and the EDA help achieve real improvements in military capability, industrial efficiency and value for tax payers? How does OCCAR work with the EDA?**
- **What lessons can be drawn from the US tanker programme and other recent efforts for trans-Atlantic acquisition? What are the prospects for genuine industrial co-operation?**
- **Can new models be developed to achieve effective defence acquisition and more efficient industries within and between NATO member states?**

Moderator: R Adm (Retd) David Oliver (United States), Executive Vice President and Chief Operating Officer, EADS NA, former Principal DUS AT&L

Speakers:

Mr Arturo Alfonso-Meirino (Spain), Director Industry & Market Directorate, EDA

Ms Isabelle Maelcamp, (Belgium), Commercial Specialist, US Mission at European Union

PANEL FOUR: The Trans-Atlantic Defence Industrial Base: Continuity and Change

This panel will address a range of issues including joint acquisition, collaborative / merger ventures, the security of supply, EU rationalization and trans-Atlantic co-operation. It will also explore future defence industrial scenarios, restructuring scenarios and their implications.

Chair: Mr Edgar Buckley, Senior Vice President, Thales (UK)

Venue: Conference Room 16

1045 – 1315 *Consolidation and Rationalisation in the Trans-Atlantic Industrial Base*

- **What are the characteristics of the trans-Atlantic defence industrial base and how are they changing?**
- **Will the US defence market remain a focus for business into the foreseeable future?**
- **Is consolidation of European defence industry making Europe more competitive in terms of technological capability?**
- **How can industrial consolidation maintain a competitive environment for national procurement, particularly for the smaller NATO nations?**
- **What are the roadblocks to cross-border business? What are the solutions?**

Moderator: Mr. Steven Grundman (United States), Vice President and Director of Aerospace, Defense, and Transportation Consulting, Charles River Associates

Speakers:

Mr Alberto de Benedictis (Italy), CEO, Finmeccanica UK

Mr Allan Cook (United Kingdom), CEO, Cobham

Mr Scott Harris (United States), President Continental Europe, Lockheed Martin Corporation

Mr Gilles Marcoin, VP European Affairs, Dassault (France)

1315 – 1415 Buffet lunch will be served in the NATO Restaurant (*Lunch hosted by Boeing*)

1415 – 1545 *Market Access and Regulation: Trading on the Other Shore*

- **What corporate development and market access strategies are suppliers using to deliver trans-Atlantic solutions? What role are industrial partnerships playing?**

- **How is trans-Atlantic defence activity affecting industry structure and security of supply? How should governments use regulatory policy to shape the evolution of the industrial base?**
- **Can SMEs play a part in bringing niche technologies to Europe? North America?**

Moderator: Mr Andrew Davies (United Kingdom), Group Strategy Director, BAE Systems

Speakers:

Mr Murad Bayar (Turkey), MOD Undersecretary for Defence Industry

Mr Thomas Culligan (United States) CEO, Raytheon International

Dr Raffaele Esposito (Italy), Finmeccanica Chairman, NIAG

Mr Steen Lynenskjold (Denmark), Senior Vice-President, Airborne Systems, Terma A/S

Conference Key Note and Panel Speakers

Panel	Position	Name	Nation	Position
	Key Note Speaker 15 th October 09	Dr Ashton Carter	US	United States Under-Secretary of Defense for Acquisition, Technology and Logistics
	Key Note Speaker 16 th October 09	Mr Håkan Jevrell	Sweden	State Secretary to the Swedish Minister of Defence
Panel 1	Chairman	Vice Admiral Dino Nascetti	Italy	Director General for Naval Armaments and Head of the Naval Weapons Engineering Group, Italian Ministry of Defence
	Moderator	Mr Richard Froh	Canada	Deputy Assistant Secretary General for Armaments, NATO HQ
	Moderator	Vice Admiral (Retd) Norman Ray USN	US	Navy and International Business Divisions for the SPECTRUM Group
	Speaker	IGA Jacques Levet	France	Deputy Chief of Staff for Plans and Programs , French Army Staff
	Speaker	Mr John Neri	Canada	Director General International and Industry Programmes, Canadian Department of National Defence
	Speaker	Mr Lucas Josten	Germany	Political Advisor, European Parliament
	Speaker	Major General (Retd) David Shouesmith	UK	PRTM Vice President, UK, Europe and Middle East
Panel 2	Chairman	IGA Patrick Fermier	France	French Defence Ministry Cabinet
	Moderator	Mr Michael Rosenberg	US	Chief of the Negotiations and Liaison Division, Office of the Secretary of Defense for Policy in the United States Department of Defense
	Moderator	Michael Codner	UK	Director of Military Sciences, RUSI
	Speaker	Mr Jeffrey Bialos	US	Partner, Sutherland Asbill, & Brennan (Law Firm)
	Speaker	Mr Pierre Arnaud Lotton	France	European Commission (Defence and Space Industry)
	Speaker	Mr Mark Clark	US	Vice President for European Region Business Development, Ratheyon International Inc (Europe)
	Speaker	Colonel Jan-Erik Lovgren	Sweden	Deputy Director General of the Swedish Agency for Non-Proliferation and Exports Controls
	Speaker	Mr Alfred Volkman	US	Director, International Cooperation, Office of the Under Secretary of

				Defense for Acquisition, Technology and Logistics
Panel 3	Chairman	Mr Robert Bell	US	Senior Vice President, SAIC
	Moderator	Dr Gunnar Hult	Sweden	Chief Scientist for FMV, Sweden's Defence Material Administration
	Moderator	Rear Admiral (Retd) David Oliver USN	US	Chief Operating Officer for EADS North America
	Speaker	Professor Trevor Taylor	UK	Professorial Fellow in Defence Management at RUSI
	Speaker	Mr Leif Lindbäck	Norway	NAD, Norwegian MoD
	Speaker	Ms Catalina Teodorescu	Romania	Head of the Industrial Co-operation Division in the Defence Resources Management Directorate/Armaments Department, Romanian Ministry of Defence
	Speaker	Mr Arturo Alfonso–Meirino	Spain	Director of the Defence Industry and Market Directorate of the European Defence Agency
	Speaker	Ms Isabelle Maelcamp	Belgium	Expert, Department of Commerce, US Mission to the EU
Panel 4	Chairman	Dr Edgar Buckley	UK	Senior Vice-President for European Business Development, Thales
	Moderator	Mr Steven Grundman	US	President and Global Director of Aerospace & Defense Consulting, Charles River Associates
	Moderator	Mr Andrew Davies	UK	Group Strategy Director, BAE Systems
	Speaker	Mr Alberto de Benedictis	Italy	Chief Executive Officer, Finmeccania UK
	Speaker	Mr Allan Cook	UK	Chief Executive of Cobham PLC
	Speaker	Dr Scott A Harris	US	President, Continental Europe, for Lockheed Martin Global Inc
	Speaker	Mr Gilles Marcoin	France	Vice President for EU and NATO Business Development, Dassault Aviation
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