



BUILDING THE DEFENCE OF TOMORROW **TOGETHER**

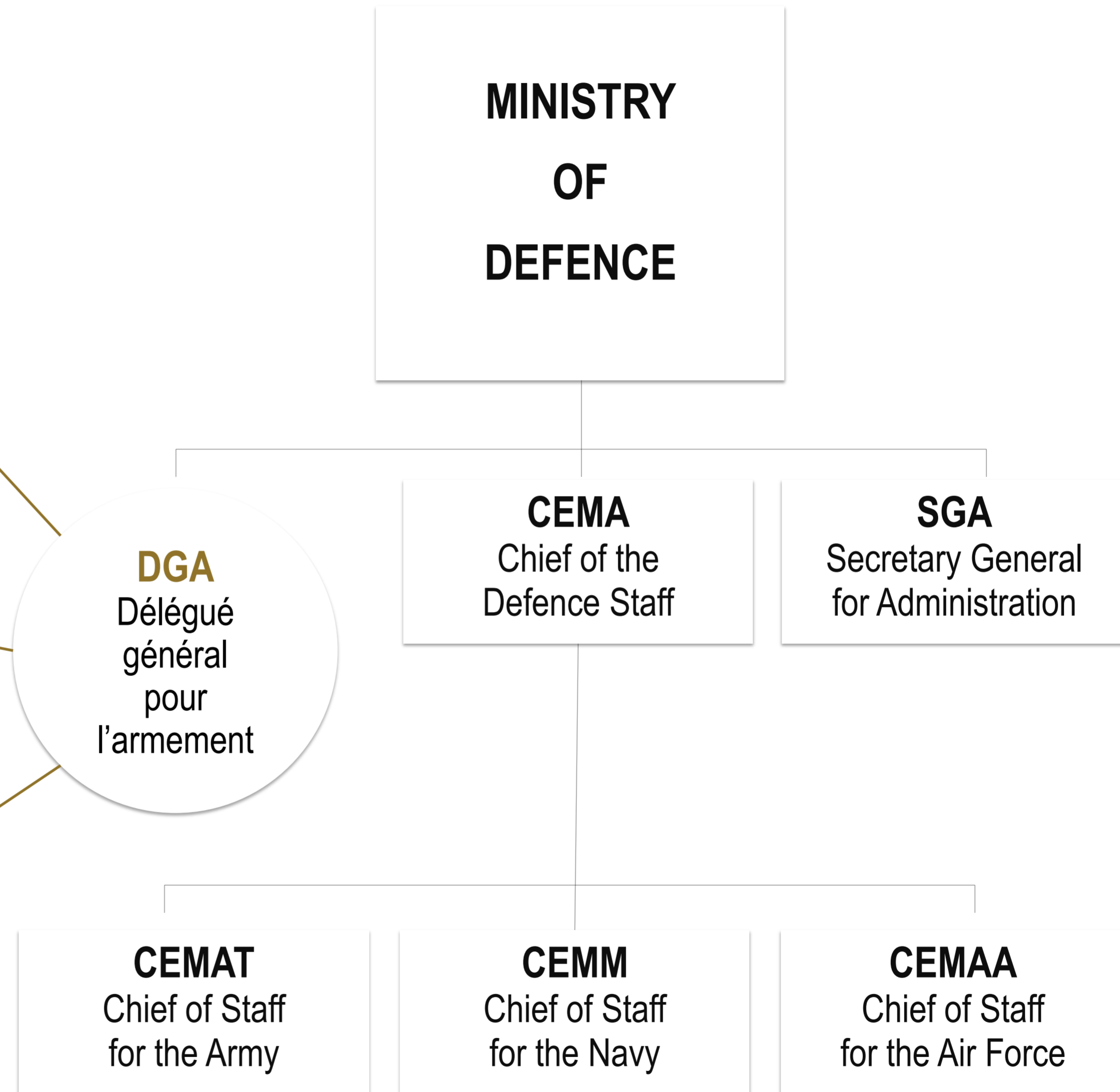


OUR MISSIONS

Procuring equipment for
the Armed Forces

Preparing the future
of Defence systems

Promoting Defence
equipment
exports



OUR ORGANISATION

CHIEF EXECUTIVE OF THE DGA
LAURENT COLLET-BILLON

Deputy Director General
VINCENT IMBERT

Deputy for Modernization
BENOÎT LAURENSOU

Inspection
NORBERT FARGÈRE

Scientific Advisor
HISHAM ABOU-KANDIL

Communication
FLORENCE FAYOLLE

Defence and Data
Security
MARIE-FRANCE DE ROODENBEKE

Armament Gendarmerie
JEAN-LUC PAYRARD

Chief of staff
YANNICK CAILLIEZ

Modernization
& Quality
BENOÎT LAURENSOU

Operations
Directorate
MONIQUE LEGRAND-LARROCHE

International Development
Directorate
STÉPHANE REB

Human Resources
Directorate
BENOÎT LAURENSOU

Strategy Directorate
CAROLINE LAURENT

Technical Directorate
FRANÇOIS COTÉ

Plans, Programmes &
Budget Directorate
CHRISTOPHE FOURNIER

1961.... 2016 **AND BEYOND**

DGA on the move

- **9 700 employees (end 2015) including more than 52% engineers and executives**
- **An engineering force**
- **A compact format** preserving its technical and managerial qualities
- **Tools and methods at the best international industrial standards:**
overall ISO 9001 certification, ISO 14001 certification of DGA centres
(environmental excellence approach, eco-design
of armament programmes)

OUR LOCATIONS IN FRANCE



OUR LOCATIONS AROUND THE WORLD

A network of armament attachés



Our DNA

FOSTER INVESTMENT, INNOVATE AND DEVELOP OUR KNOW-HOW

To

MEET THE EXPECTATIONS OF OUR ARMED FORCES

PREPARE FOR THE FUTURE OF THE DEFENCE SYSTEM

ENSURE THE GROWTH OF EXPORTS

FOSTER INVESTMENT IN INDUSTRY

Maintain a strong and competitive industry

Programmes



Science and Technology



* This figures include some payments postponed in 2016

FOSTER INVESTMENT IN INDUSTRY

Maintain a strong and competitive industry

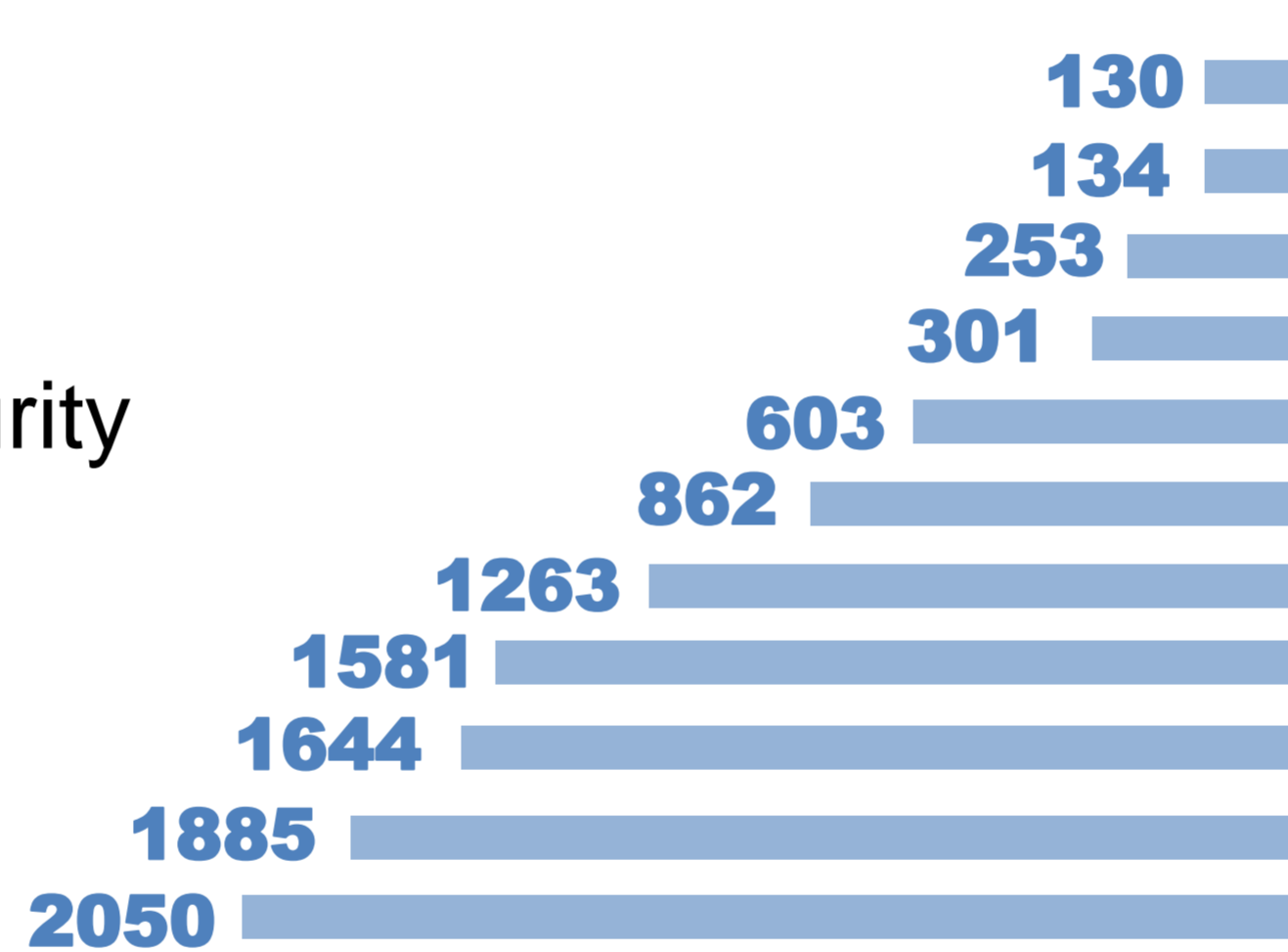
- **Long term vision for Industry**

- White book on defence and security
- Military program law (5 years)
- Annual financial law

- **Investments**

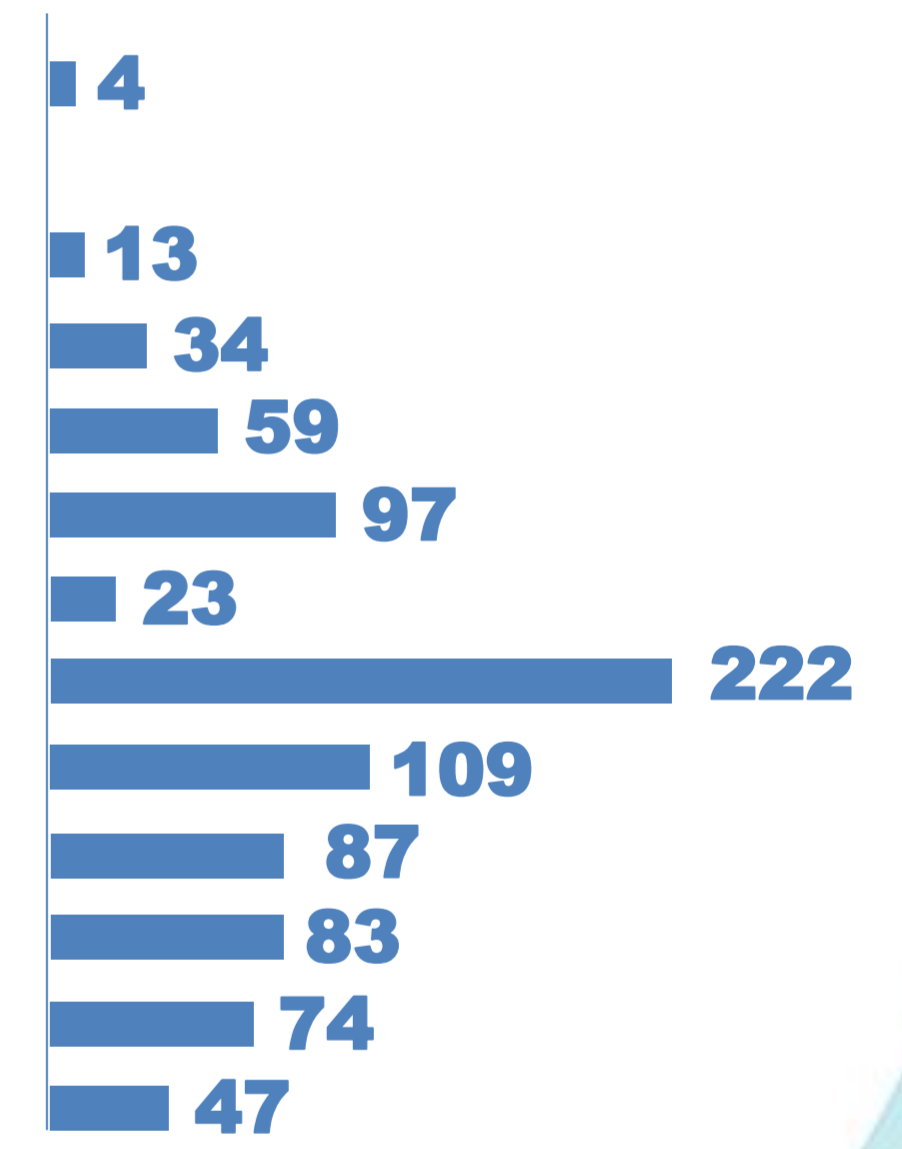
- 60 Bn € over 2014-2019

Programmes



RENAULT TRUCKS
 CNES
 NEXTER
 MBDA
 DASSAULT
 SAFRAN
 CEA
 THALES
 DCNS
 OTHER
 AIRBUS GROUP
 INNOVATION
 PUBLIC SECTOR

Science and Technology

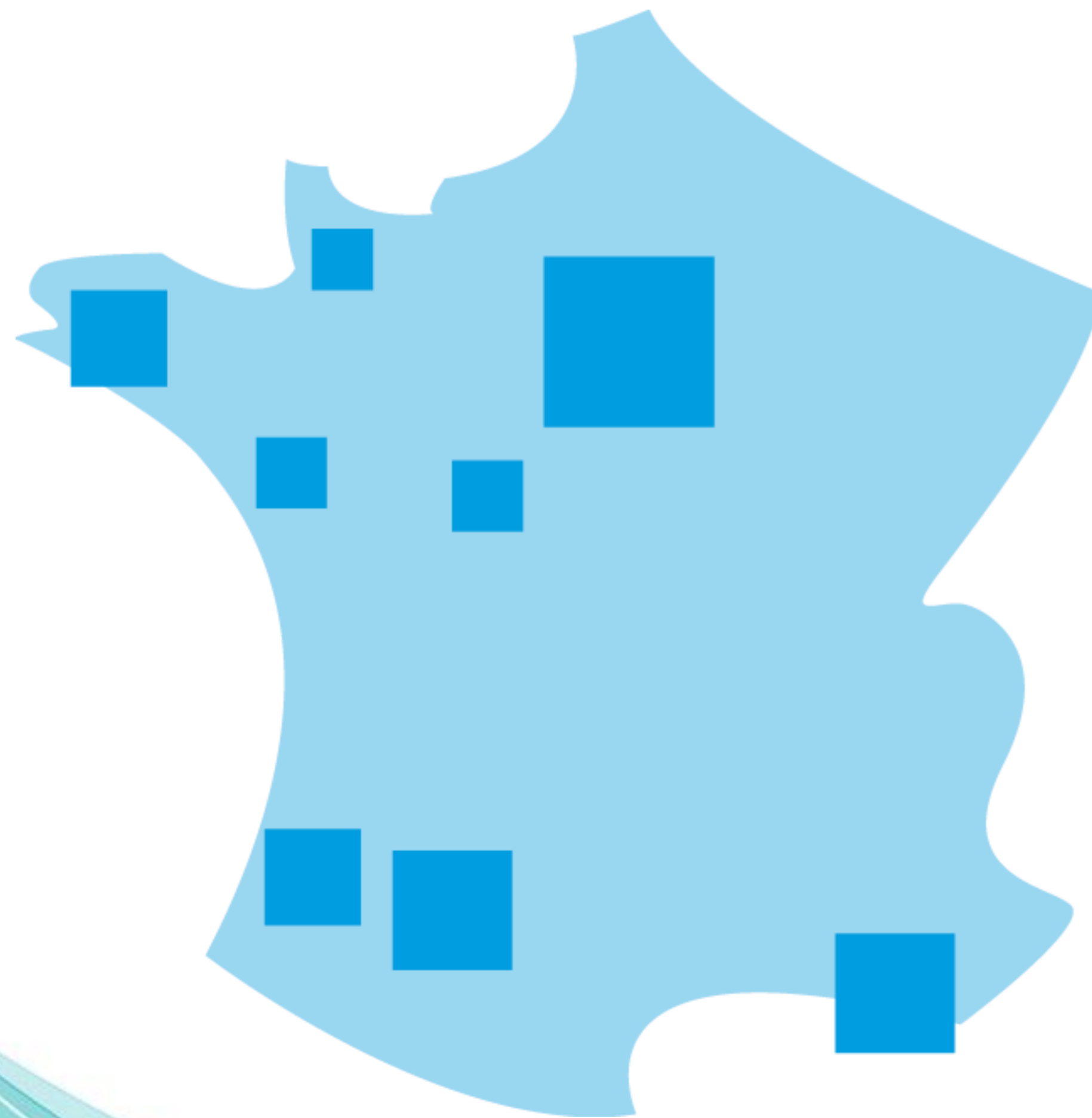


Payment allocations* to industry in 2015 (million EUR)

* This figures include some payments postponed in 2016

FOSTER INVESTMENT FOR THE ECONOMY

Map of the employment generated by Defence industry



165,000

MOSTLY HIGH-TECH JOBS
THAT CAN'T BE RELOCATED
MAINLY SPREAD
OVER 8 REGIONS

DEFENCE MARKET AND INDUSTRY SPECIFICITIES

■ Defence market

- Neither free nor open market, confidentiality issues
- **Needs mainly issued from State**
- **Limited offer**

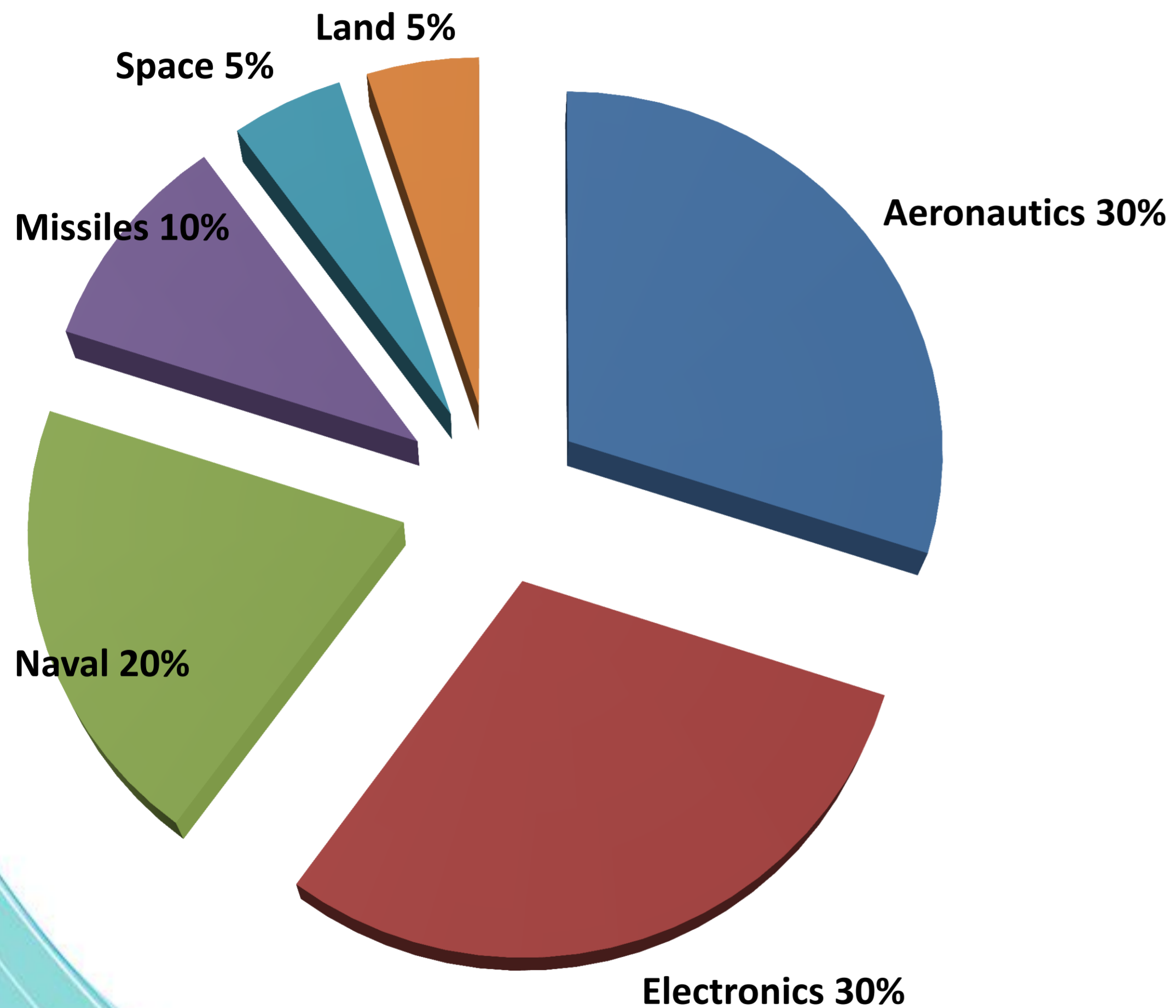
■ Defence industry

- **Lengthy development phases**
- **Necessity to maintain/sustain systems over several decades**
- **Important and increasing cost** of the programmes (self financing capability)
- **Sales tightly controlled by governmental authorities**

ISSUES OF THIS INDUSTRY

- **To access to technological and industrial defence capacities to guarantee:**
 - The supply to the Forces in the long term
 - The freedom of use of the systems
 - The possibility to export them
- **To ensure the support of a DTIB at a national or European scale:**
 - **Competitive and innovating** (at reasonable costs for the State)
 - At the **right level of autonomy**
 - **Rationalized**

DGA-INDUSTRY RELATION



Investments share by field in France

■ Investor

- Buying guidelines, R&T / R&D guidelines, desired industry landscape

■ Support for innovation

■ Regulatory authority for laws and rules

■ International partnership

■ Shareholder and industrial operator

■ Specific tools for SME support

REGULATOR ROLE

OBJECTIVES

- To keep an **efficient follow-up** of the **restructured industry** and of **its capacities**
- To **control direct foreign investments** in this industry
- To **control mergers / fusions**

STAKEHOLDER ROLE

SHARES / HOLDINGS

- **Shares in defence companies**
 - **Nexter, DCNS, DCI, ODAS, Safran, Thales, Airbus, ...**
- **Governance of holdings/shares, on behalf of the State, jointly by:**
 - **The APE** (Agence des Participations de l'Etat): a special agency of the Government of France managing the State's holdings
 - **The DGA** to ensure the strategy's coherence with the protection of the defence's interests

BOOST **INNOVATION** FOR THE FUTURE



- Daring technological breakthroughs
- Detecting emerging technologies
- Keeping one step ahead
- Testing new solutions
- Managing a complete ecosystem
 - chain of stakeholders: research laboratories, academic and industrial partners
 - **strategy**: sciences & technologies for the Ministry of Defence



62 new RAPID projects, **50 M€**

+ competitiveness clusters, **13 M€**

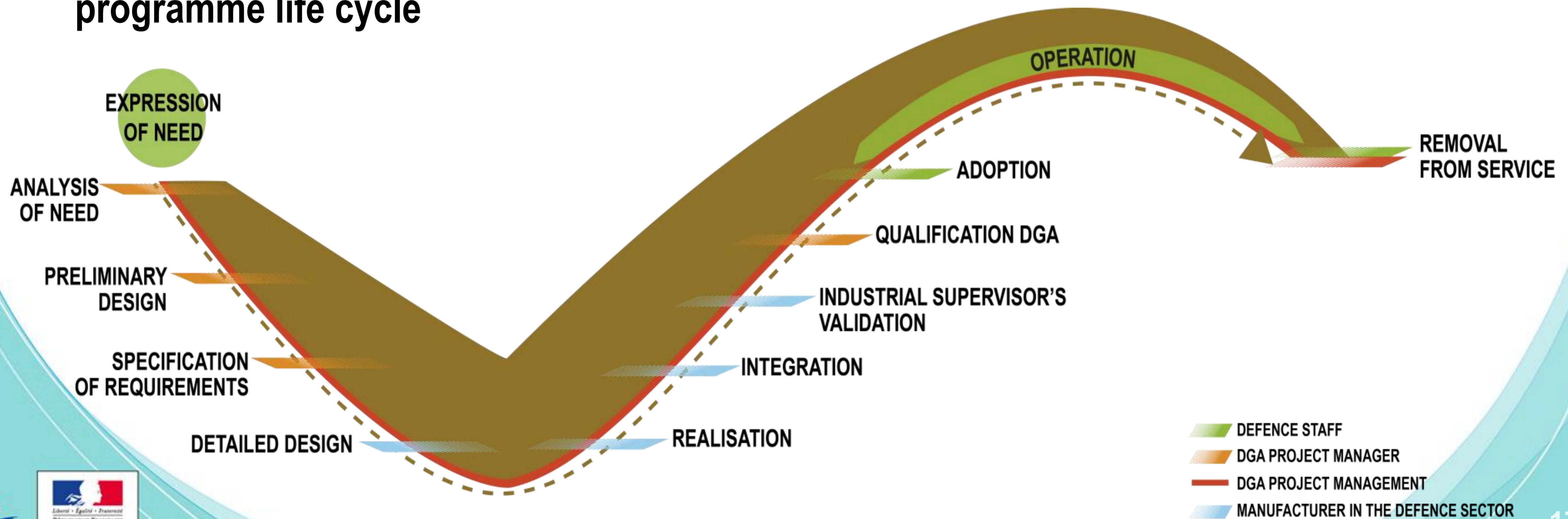
- 4th edition of DGA innovation forum
- 8 new ASTRID Maturation projects
- club RAPID *B2B* with 30 industrials
- Regional meetings



PROGRAMME KNOW-HOW

Phases and participants

- 80 programmes managed by the DGA
- Project management and overall coherence of our weapon systems over the whole programme life cycle



PROGRAMME KNOW-HOW

Integrated programme team



DGA TOGETHER WITH ARMED FORCES

■ Equipment deliveries

- 2 new A400M aircrafts for the French Air Force for a total of 8 A400M in service
- NH90: 3 NFH and 4 TTH, for a total of 33 aircrafts
- 6 Tigre helicopters (total 55 delivered)
- 5 new Rafale and 2 Rafale retrofitted for the Navy for a total of 142 Rafale delivered
- Delivery of the FREMM *Provence*

■ Orders preparing the future

- Aster 30 B1NT, COMSAT NG, 3rd MUSIS satellite, definition of the Maritime Mine Counter Measure system

■ Technical expertise, testing and evaluation



PROGRAMME KNOW-HOW

2016 Perspectives

Important milestones, some examples

■ ORDERS

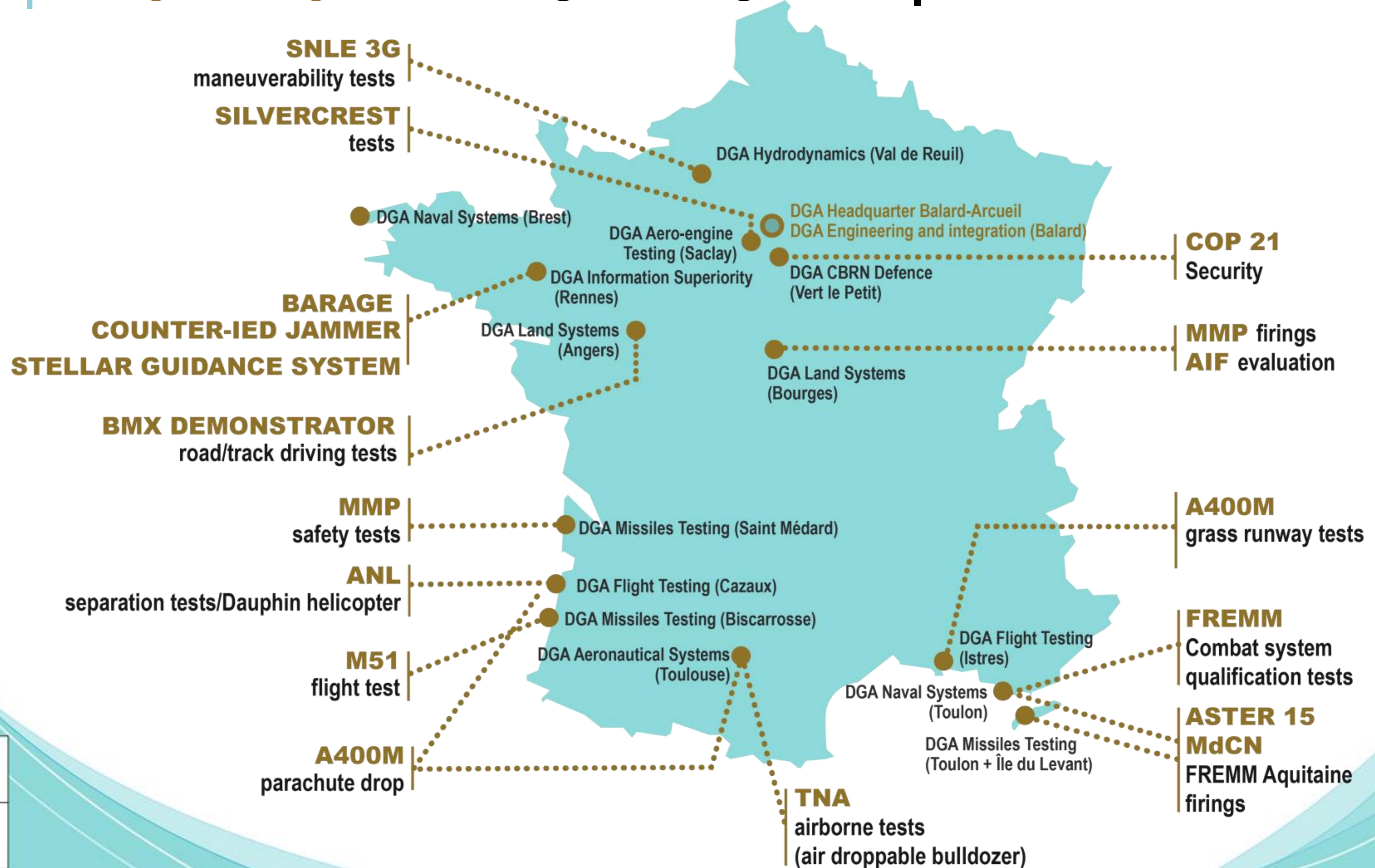
- SDT (tactical UAV system), MLU Mirage 2000 D, AIF (future Individual weapon), Fomedec, laser-guided rockets, MLU SCALP-EG, Reaper UAVs, BSAH, cyber equipment

■ DELIVERIES

- RAFALE, A400M, Tigre, NH90, detection and control centre SCCOA, SIA deployable modules, ASTER missiles, FREMM, multi-mission ship (B2M), Special Forces Vehicles, SSBN Triomphant modified for M51 missile



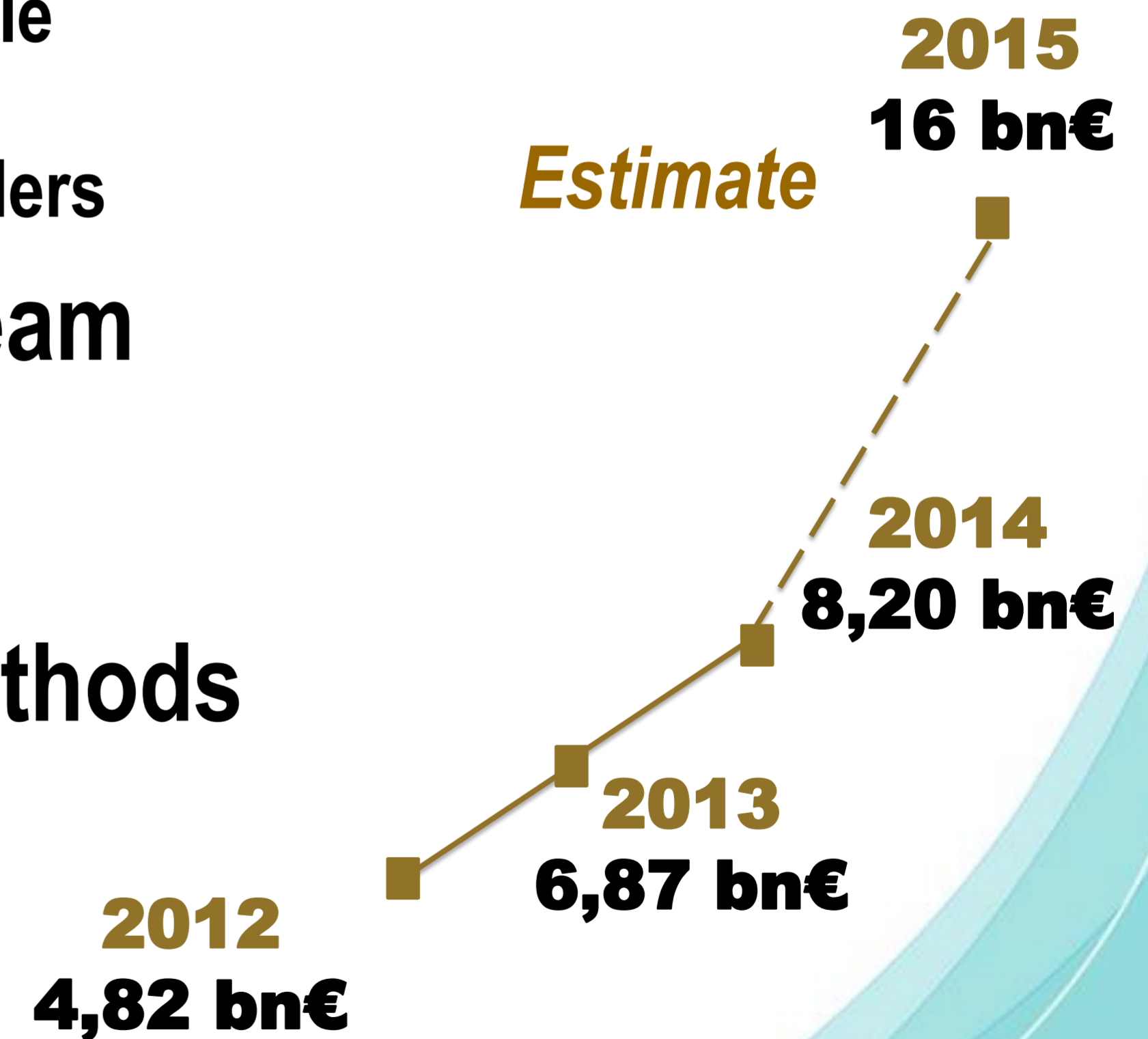
TECHNICAL KNOW-HOW Important milestones in 2015



FOSTER EXPORTS

A historic year

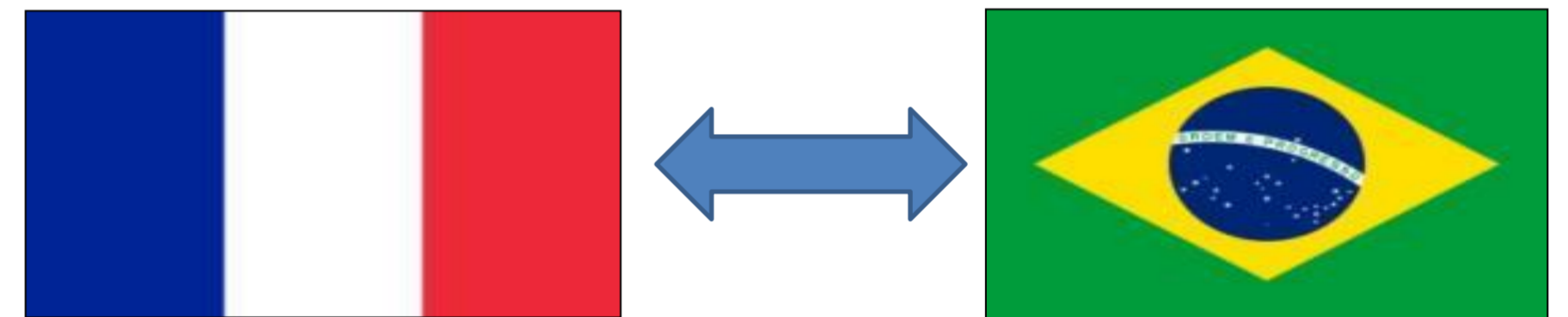
- Estimate **16 bn EUR** orders
(definitive figure end of May)
 - Main contracts: Egypt Rafale + FREMM ; Qatar Rafale
 - 5 major contracts above 500 m EUR
 - Africa / Middle-East represent more than 80% of orders
- The **DGA** on the front line of France's team led by the Ministry of Defence
- France's customers are asking for an increased **DGA support**: recognized methods and a unique technical expertise



POSSIBLE COOPERATION WITH BRAZIL

■ French programmes

- Brazilian companies can team with French and / or European companies for a common offer to futures needs through RFI, RFP emitted by the DGA according to French and European laws and rules
- The selection is based on fair and known criteria
- Some tenders are limited to European prime contractors



■ Partnerships with French companies

- Brazilian companies can develop partnerships with French companies either in Brazil or in France (through nationalization programmes or direct investments / stakes)
- Export defence goods / components from Brazil from French subsidiary companies

DGA 2025, ANTICIPATION IMMÉDIATE

An ambitious and concrete transformation plan



4 dimensions

- **INTERNATIONAL: increase exports**

The DGA as the key representative of the French State at all stages of the customer lifecycle

- **CAPACITIES: optimize Defence**

A new capability-driven approach shared by the DGA and the Forces

- **INNOVATION: Foster French innovation**

The DGA as a driving force for the industry as well as for civilian and military research

- **DIGITAL: ensuring control of the digital environment**

Collaborative work between the DGA & industrial and state partners