

# DSEI

15 - 18 September 2015

The World Leading  
Defence & Security Event

ExCeL, London [www.DSEI.co.uk](http://www.DSEI.co.uk)



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ORGANISED BY



# Rear Admiral Simon Williams OBE

Chairman  
Clarion Defence & Security Portfolio  
Clarion Events



# Clarion Defence & Security Portfolio



**LAND FORCES**  
AFRICA 2015

6 - 8 July 2015 | Pretoria | South Africa



**LAAD**  
DEFENCE & SECURITY  
2015

APRIL 14-17, 2015  
RIOCENTRO | RIO DE JANEIRO | BRAZIL



**Sea Air Space**  
50th



**COUNTER TERROR EXPO**

21 - 22 April 2015  
Olympia, London  
CounterTerrorExpo.com



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**MCSEA**  
MARITIME &  
COASTAL SECURITY  
AFRICA

23-25 November 2015 | Cape Town | South Africa



**LAAD**  
SECURITY  
2016

APRIL 12 - 14, 2016  
RIOCENTRO | RIO DE JANEIRO | BRAZIL



**Electronic Warfare Europe**

26-28 May 2015  
Stockholm Waterfront Congress Centre



**FORENSICS EUROPE EXPO**

21-22 April 2015  
Olympia, London  
ForensicsEuropeExpo.com



**UDT**  
Undersea Defence Technology

3-5 JUNE 2015  
ACC Liverpool, UK  
www.udt-global.com



**AUSTERE MEDICAL ENVIRONMENTS**

1-2 DECEMBER 2015 OLYMPIA, UK



**UAS**

7-8 JULY 2015 | TWICKENHAM UK  
WWW.UAS-EVENT.COM



**Electronic Warfare BRAZIL**

APRIL 2015 | RIO DE JANEIRO



**Ambition**

21-22 April 2015  
Olympia, London  
www.ambitionexpouk.com



**ITEC**  
Defence | Training | Simulation | Education

28 - 30 April 2015  
PVA Expo, Prague

# Running Order



- Setting the context
- DSEI 2015 – innovations and compliance
- Marketing & PR
- Getting the most from VIPs



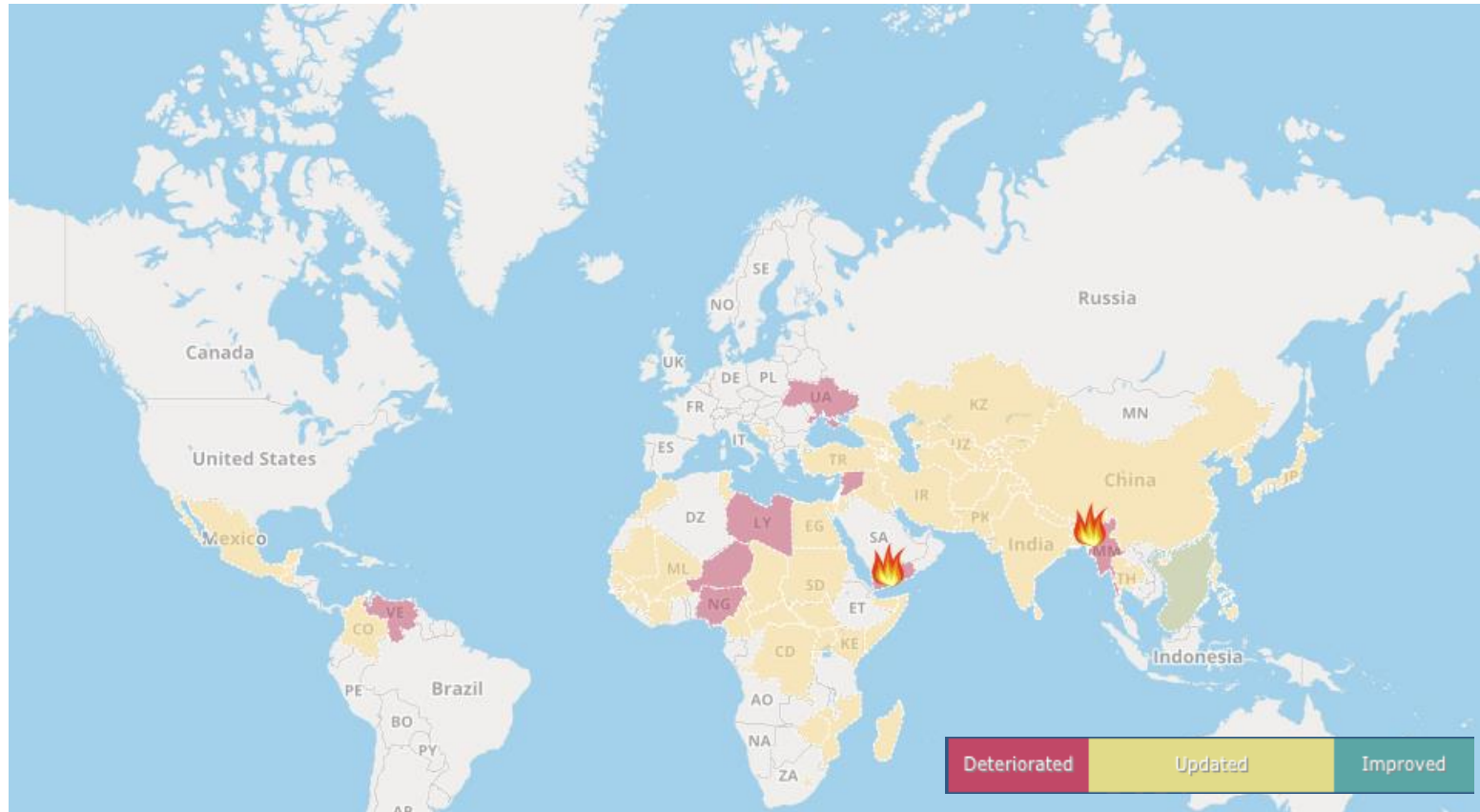
# DSEI in context



- International business, international event
- Global context
  - Security environment
  - Defence & security spending
  - Capability development
    - Industry response
    - User response
    - Societal response
- All reflected in our approach to DSEI



# What's in the news ...



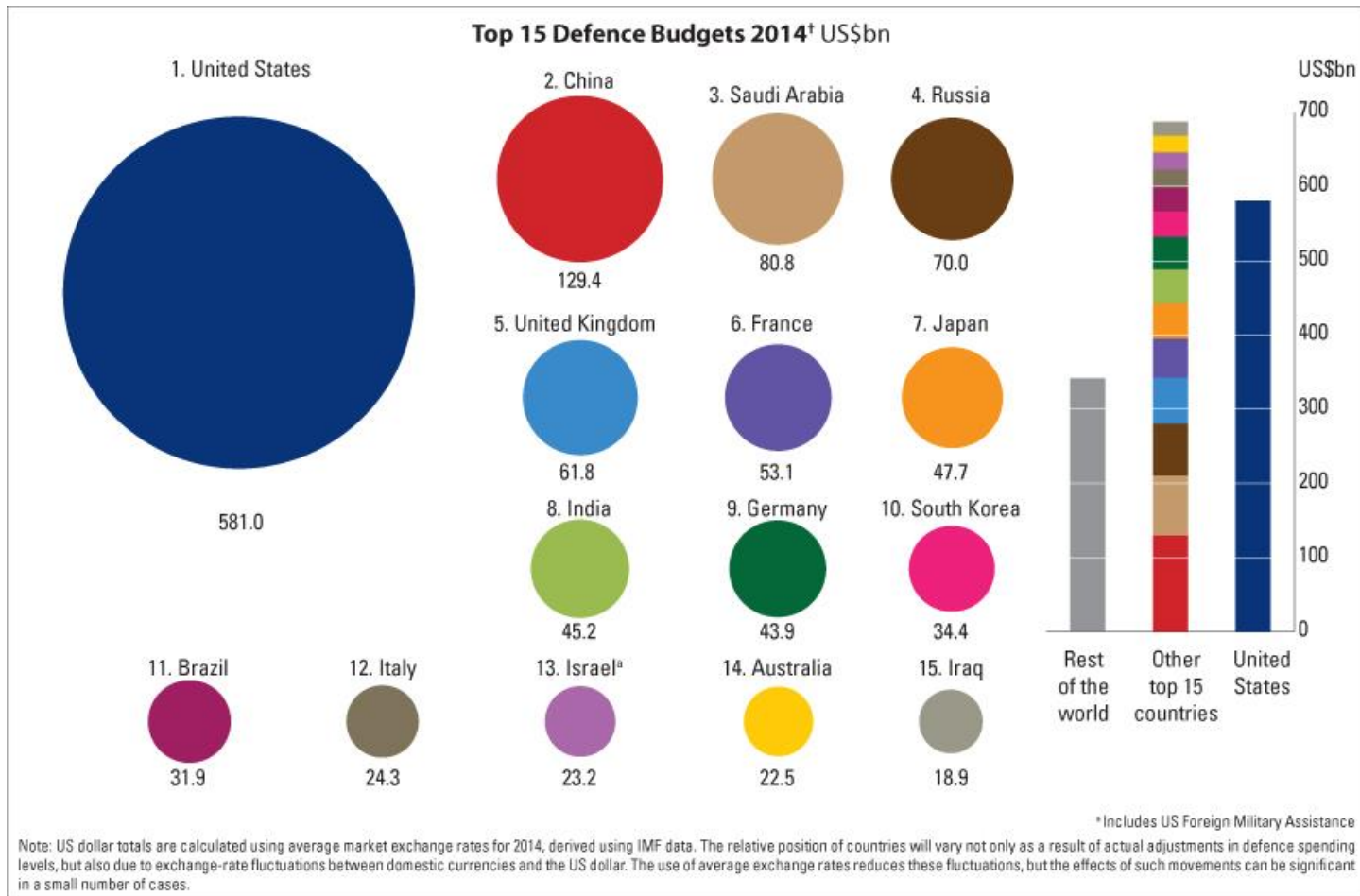
# Defence Spending



- Western spending under tension
  - NATO declared goal of 2% of GDP
  - Countries reversing earlier declines
  - Austerity programmes
- US operational spending reduced
- Asian spending increasing
- But ....



# Total Defence Spending

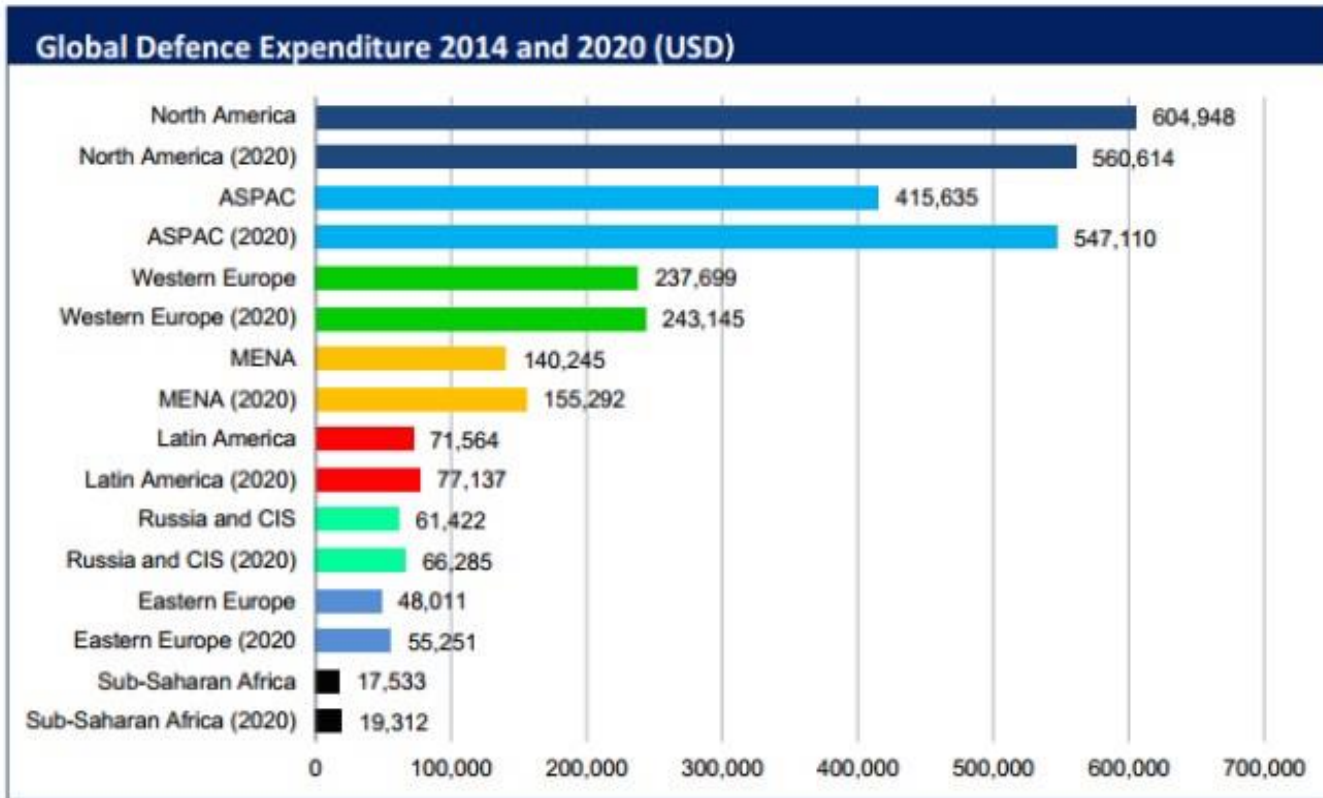


Source: IISS 2015  
 Military Balance





# Projected Spending to 2020



Source: IHS Janes



# Market Changes

- US
  - More certain spending outlook
  - Reductions in operational budgets
  - Maintaining state on state & counter insurgency forces
- Europe
  - Smart Defence: collaboration, consolidation & COTS
  - Ageing platforms driving replacement
  - Upgrades, life-extensions for existing platforms
- Middle East, E Asia, Africa and Latin America
  - New equipment spends still rising
  - Offset agreements to secure work
  - High levels of low cost manpower retained



# Market effects

- Active global market in search of value
  - Emerging market countries seek high technology partners
- Industry consolidation
  - Concern on supply chain fragility
- US, Europe remain dominant markets for high technology equipment

