Andalusian RIS3 dual use & Defence priorities

Symposium on Synergies between EU Funding for Defence and Dual Use Research & Innovation

Carmen Sillero Illanes
Agency of Innovation and Development of Andalusia
Seville, 3rd de octuber 2018
RIS3 ANDALUCÍA

ANDALUSIAN INDUSTRIAL STRATEGY
EIA 2020

DUAL USE AND DEFENCE INDUSTRY IN ANDALUSIA

ADVANCED MANUFACTURING IN THE TRANSPORT INDUSTRY: AEROSPACE, NAVAL AND AUTOMOTIVE. CADIZ 27/10/2017

DUAL USE TECHNOLOGIES IN TRANSPORT INDUSTRY. 3er ENCUENTRO INTERNACIONAL DUAL USE - INFODAY CLEAN SKY. SEVILLA 15/11/2017

AEROSPACE INDUSTRY IN ANDALUSIA. UAV INDUSTRY. MÁLAGA 01/12/2017

INDUSTRY 4.0. SEVILLA. 06/10/2017
Entrepreneurial Discovery Process

**Forums**
Territorial, CLUSTERS, sectors, ...(variable geometry and may or may not be permanent over time)

Push

**Entrepreneurial Discovery Process**

**Codecisión Table**

- Working groups
- Working Gropus
- ... Working groups

**Public Private Participation**

- General Innovation Secretary of the Andalusian Government
- Coordination
- Technical Secretary
- Support

**Private**
GROUP SESSION PREPARATION

- Preparation of documentation. Working-sheet of every opportunity raised
- Selection of invited experts
- Invitation remittance
- Submission of documentation and call for attendance
- Receiving proposals from expert guests
- Elaboration of actions to be prioritized for each opportunity

FUNCTIONS

1. Analyzing the opportunities detected in the Entrepreneurial Discovery Process:
   - Vertical opportunities identified in the preparation of the EIA2020
   - Opportunities coming from the Governance (Codecision Committee, Forums, Technical Team)
2. Validating and ranking the opportunities
3. Raising validated Opportunities to the Codecision Committee for its transformation into EIA2020 Measures

DEVELOPMENT GROUP MEETING

- Institutional opening
- Participation and Debate
- Voting for prioritization

COLLABORATIVE PLATFORM  www.estrategiaindustrialdeandalucia.org

- Information Exchange
- Management of thematic groups
- Repository of documents
OEMs Andalusia Turnover 1.722 M€

Auxiliary industry in Andalusia: 317 companies
Turnover 1.300 M€

TOTAL Turnover (2016) 3.022 M€

18,610 Jobs => 9% Regional Industrial Jobs*

TECHNOLOGICAL INFRASTRUCTURES

STAKEHOLDERS

CTA- Cádiz
ATLAS

KNOWLEDGE AGENTS

(*) ICT sector not considered
Session 3 "AEROSPACE INDUSTRY IN ANDALUSIA. OPPORTUNITIES FOR THE UAV INDUSTRY
December 1, 2017
Government Delegation, Malaga
Opening; Mr Javier Carnero, Consejero de Empleo, Empresa y Comercio

Opportunities analysed

<table>
<thead>
<tr>
<th>Opportunities analysed</th>
<th>Number of activities prioritised</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Aerospace Industry</td>
<td>13</td>
</tr>
<tr>
<td>2. UAV opportunities</td>
<td>20</td>
</tr>
</tbody>
</table>

Observations: Proposals received, 58. which were synthesized in 33 analyzed actions, given the high interest it aroused
Andalusian companies are willing to be an active part of the European Defense industrial base and to participate in equal conditions in the European defense market.

- Very opaque markets for SMEs, fierce competitiveness, highly conditioned by domestic buyers and geopolitical conditions
- SMEs need to reduce dependence of their traditional tractors, Increasing their capabilities and gaining size, working in clusters and intercluster, especially cooperating with national/international companies and knowledge centers
- Development of a nearby supply chain.
- Long term policies needed to support innovation
- Faster taking in of knowledge along the supply chain. Adaptation to Industry 4.0
- Counting on technological infrastructures at the service of the companies
- Development of new skills. Vocational Training. Agility in providing specialized skills, especially for facing the threats of cybersecurity.
- Space is a clear example of European value sector. New business models based on cost reduction: New Space, within this, the NEAR SPACE.
Cadiz, Advanced Manufacturing Center, (CFA)

ATLAS. Estratoport HAPS (High Altitude PlaForms)

CEUS-CEDEA

CDTI-“Radar monoestático SST Morón de la Frontera”, (SST - Space Surveillance and Tracking) de la ESA.
SECTORIAL PLANNING FOR ANDALUSIAN AEROSPACE SECTOR 2018-2023

STRENGTHENING THE RELATIONAL CAPITAL OF SPACE INDUSTRY ECOSYSTEM IN ANDALUSIA

ADVANCED SERVICES LINKED TO DUAL TECHNOLOGIES

INDUSTRIAL PROGRAMME BASED ON INNOVATIVE PUBLIC PROCUREMENT ON UAV
INCENTIVE FRAMEWORK

240 M€

ANDALUSIAN PUBLIC FUND FOR BUSINESS FUNDING AND ECONOMIC DEVELOPMENT, Financial instrument 958.4 M€ of Andalusian funds and ERDF
GRANTS*   PROJECTS FUNDED 2015-16

<table>
<thead>
<tr>
<th>LINE</th>
<th>NUMBER</th>
<th>INVESTMENT</th>
<th>AID</th>
<th>JOBS</th>
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</thead>
<tbody>
<tr>
<td>GROWTH</td>
<td>11</td>
<td>4,754,103</td>
<td>1,340,201</td>
<td>11</td>
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<tr>
<td>CREATION</td>
<td>5</td>
<td>4,147,403</td>
<td>1,445,508</td>
<td>5</td>
</tr>
<tr>
<td>TOTAL</td>
<td>16</td>
<td>8,901,506</td>
<td>2,785,709</td>
<td>16</td>
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</tbody>
</table>

NEW CALLS GRANTS +2017 (**)

INDUSTRIAL DEVELOPMENT CALL
PROJECTS SUBMITTED 35, P2 RIS3
123’5 M € Total industrial investment

R&D CALLs
PROJECTS SUBMITTED 12, P2 RIS3
111 M€ Total R&D investment

INNOVATION JOINT UNITS CALL
PROJECTS SUBMITTED 2, P2 RIS3
6.7 M€ total R&D investment

FINANCIAL INSTRUMENTS

<table>
<thead>
<tr>
<th>PROJECT</th>
<th>INVESTMENT</th>
<th>LOAN</th>
<th>JOBS</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL</td>
<td>9</td>
<td>5,893,908</td>
<td>3,328,940</td>
</tr>
</tbody>
</table>

* Within the framework of the 2015 and 2016 calls, transport industry projects (CNAE 29 and 30) and projects included in priority P2 positively resolved. Consolidation of advanced industry linked to transport,

** Resolution pending
SYNERGIES AND ALLIANCES

Dual Use Technologies
Seville Declaration

SYNERGIES

Vanguard Initiative
New growth through smart specialisation

eurada

Clean Sky 2

European Network of Defence-Related Regions

EUROPEAN DEFENCE AGENCY

EDSP

EUROPEAN COMMISSION

Seville, Oct. 27-28 2016

Dual-Use Technologies and RIS3 Strategies in Europe.
Cooperation among all sizes companies, european, national and regional goverments, science and innovation entities, Ministries of Defense.... is needed to build a solid and coompetitive european industrial defence base

Let ‘s do it together!

Thank you for your attention

Carmen Sillero
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Agencia de Innovación y Desarrollo de Amdañicóa

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