



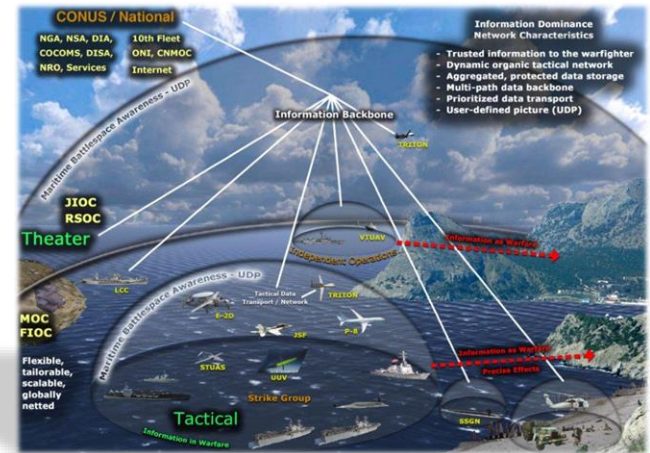
INDUSTRY DAY

5 APRIL 2018



Sense of Urgency

The US now faces a more competitive and dangerous security environment than we have seen in generations, demanding clear-eyed appraisal of the threats we face, acknowledgement of the changing character of warfare and a transformation of how the DoD conducts business
(National Defense Strategy 2018)



Technology and the Changing Character of War

Diffusion, Competition and New Threats

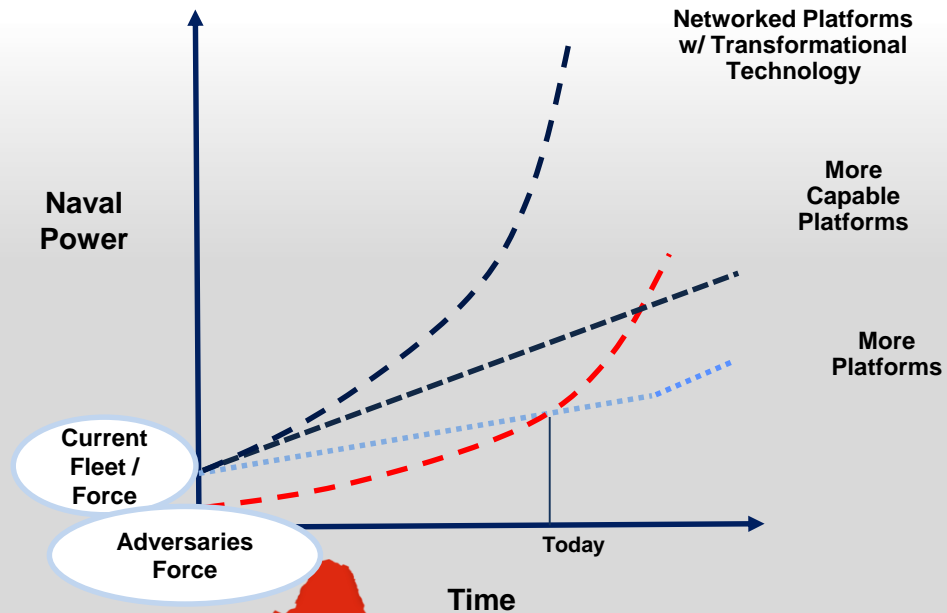
- Competition to develop new technologies is relentless, expanding to more actors with lower barriers of entry and moving at accelerating speed
- Many technological developments will come from commercial sectors that affords state and non-state competitors access

Everything we do must contribute to the increased lethality of our military. We must never lose sight of the fact that we have no God-given right to victory on the battlefield.

- Secretary James N. Mattis



U.S. Naval Superiority is NOT Guaranteed



Renewed Urgency in R&D is Needed to Win