

Part I

Special Focus: Canada

1. Canadian Aerospace Industry; Exports and Orientation
2. Canada: Participation in International Missions
3. Epicos “Industrial Cooperation and Offset Projects”
4. UDP communication optimization for inter-UAV communications in modern Network Centric Warfare operations
5. Ballistic protected container field kitchen for peace keeping operations and catering services near the front line
6. SMI Event: Border Security: Intelligent solutions to better enhance the security of International borders
7. Epicos - Amazon

Part II

Epicos Newsroom

1. Canada announces aviation agreements with 7 countries
2. Rolls-Royce announces US aircraft engine contracts
3. Air France is being 'saved', heads for profits
4. Japan Airlines orders 31 Airbus planes in \$9.5 bn deal
5. French defence minister talks deals in Saudi Arabia

Canadian Aerospace Industry; Exports and Orientation



Currently Canadian aerospace industry is rather advanced as Canadian companies have a well-deserved reputation for quality, value, performance and reliability. They are recognized by customers around the world for delivering leading-edge and advanced technology solutions on time and at a

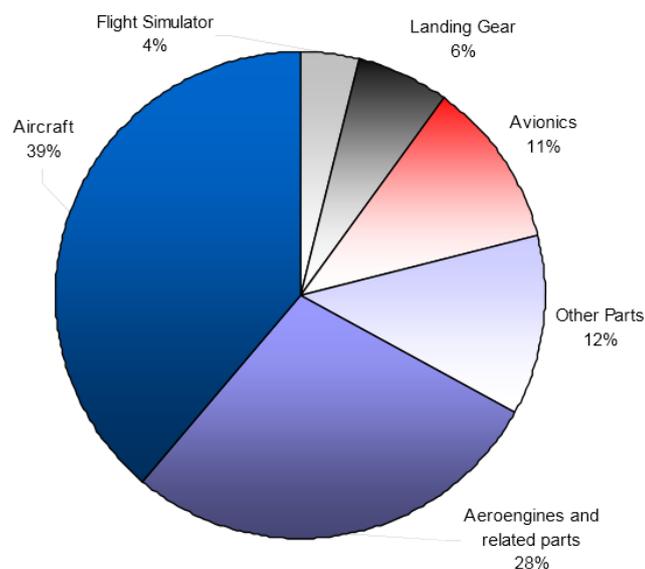
competitive cost. The Canadian aerospace industry is comprised of over 700 firms of all sizes during the decade 2002-2012. During these years a sizeable increase in number of medium-sized firms and in parallel a slight decline in number of small-sized firms occurred.

The main advantages of the Canadian aerospace industry are mainly the following:

- Proven market leader
- Cutting-edge space technology
- A strong R&D infrastructure across Canada
- A highly skilled, educated and specialized workforce
- NAFTA and worldwide export markets
- Specialised and competitive clusters

The Canadian aerospace manufacturing sector is one of the most exports intensive and exports diversified for the Canadian economy. It is indicative that more than 45% of the Canadian aerospace product exports are destined to non US markets in contrast to close to 20% for total Canadian goods exports. As it is depicted in the pie-chart below aircraft is the most dominant segment, whereas engines and related parts follow in terms of Canada's aerospace exports footprint.

Canadian Aerospace Product Exports Segment Analysis (2012)



Source: Industry Canada

The Canadian aerospace manufacturing sector is one of the most R&D intensive in the Canadian economy. It is worth mentioning that aerospace manufacturers increased their R&D investment by more than 40% during the period 2007-2012. The vast majority of this activity is performed in Central Canada (65% in Québec and 29% in Ontario).

While the continued success of the Canadian aerospace industry cannot be guaranteed, the strong base upon which it is built and the help provided by the Canadian authorities will definitely help its future development. The country's authorities help the companies through attractive investment fundamentals; leading-edge knowledge infrastructure; risk-sharing investments in technology development; commitment to investing in skills and research; and new business opportunities.

Kyriazis Vasileios,
Epicos Newsletter Head Editor

Canada: Participation in International Missions



National Defence and the Canadian Armed Forces



More than 1,300 Canadian soldiers, sailors, airmen and airwomen are currently serving with task forces deployed on

expeditionary operations. The vast majority of them are participating in missions taking place in Asia, namely 950 soldiers are deployed in these missions representing 69% of the total deployed Canadian soldiers. Middle East follows with 71 soldiers, whereas in Africa and Europe there are 69 and 6 soldiers respectively. In the table below there is a summary of all missions the Canadian armed forces participate.

Asia			
Canadian Contribution Training Mission Afghanistan (CCTM-A)	Operation ATTENTION	Canada's participation in the NATO Training Mission Afghanistan (NTM-A)	950
Americas			
Task Force Port-au-Prince	Operation HAMLET	Canada's participation in the United Nations Stabilization Mission in Haiti (MINUSTAH)	39
Africa			
Air Task Force Mali	Support to French operations in Mali	The Canadian Armed Forces are supporting the Government of France's <i>Operation SERVAL</i> , which is their military intervention in the West African country of Mali.	40
Task Force DRC	Operation CROCODILE	Canada's contribution to the United Nations Stabilization Mission in the Democratic Republic of the Congo (MONUSCO)	9
Task Force Darfur	Operation SATURN	Canada's contribution to the U.N. African Union Mission in Darfur (UNAMID)	6
Task Force South Sudan	Operation SOPRANO	Canada's participation in the United Nations Mission in the Republic of South Sudan (UNMISS)	14
At Sea			
Task Force Toronto	Operation ARTEMIS	Canada's participation in maritime security and counter-terrorism operations in the Arabian Sea	250
Middle East			
Task Force Middle East	Operation JADE	Canada's participation in the United Nations Truce Supervision Organization (UNTSO)	8
Task Force Golan Heights	Operation GLADIUS	Canada's participation in the United Nations Disengagement and Observer Force (UNDOF) on the border between Israel and Syria	3
Task Force El Gorah	Operation CALUMET	Canada's participation in the Multinational Force and Observers (MFO) in the Sinai Peninsula of Egypt	28
Task Force Jerusalem	Operation PROTEUS	The Canadian team working with the Office of the U.S. Security Coordinator to build security capacity in the Palestinian Authority	20
Task Force Tampa	Operation FOUNDATION	The deployment of Canadian Armed Forces liaison and staff officers to US Central Command Headquarters, US Air Forces Central Headquarters and Combined Maritime Forces Headquarters	12
Europe			
Task Force Cyprus	Operation SNOWGOOSE	Canada's participation in the United Nations Force in Cyprus (UNFICYP)	1
Task Force Pristina	Operation KOBOLD	Canada's contribution to the NATO Kosovo Force (KFOR)	5

As it is already mentioned, the vast majority of troops operate in Asia and more specifically in the NATO's Training Mission in Afghanistan. The Canadian task force known as the Canadian Contribution to the Training Mission in Afghanistan or CCTM-A is concentrated in Kabul, with a satellite team at the Regional Military Training Centre North in Mazar-e-Sharif.

The second mission in terms of participating units is the Operation ARTEMIS mission. *Operation ARTEMIS* is the Canadian Armed Forces' current participation in maritime security and counter-terrorism operations in the Arabian Sea. Canada is one of 29 nations which contribute naval assets to the specific mission. Finally, Canada is also participating in 4 missions in the Middle East, 4 in Africa, 2 in Europe and 1 in the Americas.

Kyriazis Vasileios,
Epicos Newsletter Head Editor

Epicos “Industrial Cooperation and Offset Projects”



Epicos “Industrial Cooperation and Offset Projects” provides a unique set of online tools enabling the structure, identification and implementation of comprehensive Offsets programs, through a searchable database. By introducing different offset projects and ideas proposed by local A&D industry it ensures the optimum cost for Prime Contractors and reassures that the priorities of local industry are fully met...

[For Further Information Press Here](#)

UDP communication optimization for inter-UAV communications in modern Network Centric Warfare operations



A company excelling in the design and development of advanced real time data exchange solutions for inter-UAV communication requirements is proposing the installation of a new UDP smart gateway design providing hard real time and secure data exchange between application machines. The proposed system architecture supports specific requirements including: time-critical and mission-critical applications, limited bandwidth, hot redundancy and deterministic behavior. The system will fully support the new concepts for advanced Network Centric Warfare (NCW) operations using unmanned platforms.

[For Further Information Contact our ICO Department](#)

Mail at: g-menexis@epicos.com

Ballistic protected container field kitchen for peace keeping operations and catering services near the front line



A modern company with a long history in manufacturing high quality products for demanding customers in the fields of thermal technology and advanced use of stainless steel (modern field catering systems and equipment for rapid deployment troops from refrigerated trailers to field kitchens) is proposing the sourcing of a ballistic protected container field kitchen for peace keeping operations and catering services near the front line. The proposed field kitchen will be installed in a NATO standard container and it will be equipped with catering equipment utilizing the best possible ergonomic and working conditions for the personnel.

[For Further Information Contact our ICO Department](#)

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SMi Group reports: Industry leading experts in Border Security will meet in Sofia in February 2014.



SMi Group proudly presents its 7th annual **Border Security** Conference, taking place in Sofia, on the 26th-27th of February 2014. Registration for the event is now open.

Returning to Bulgaria, **SMi's Border Security 2014 Conference** will feature discussion on current concerns in Eastern Europe and around the world. As a relatively new member of the European Union, Bulgaria faces geo-political challenges unlike many of its co-members. Along with Romania, it is also doing everything it can to be accepted in to the Schengen Area. This necessitates effective border policing and this position as a border security hot spot makes it an ideal and intriguing venue.

What's new in 2014:

- Host nation address from Chief Commissioner Penov, **Chief Directorate of Border Police, Bulgaria**
- Hear about the case study from Haiti covering **cross border criminal activity, and irregular migration**
- Brazil's strategy for protection of **port security**, and preparations for the **upcoming Olympics and World Cup**
- Learn the new approaches of the **Schengen border security evaluation mechanisms**
- Discuss the 21st Century Challenges of **Border security for developing countries**

SMi Presents the 7th Annual
BORDER SECURITY 2014
 SHERATON SOFIA HOTEL BALKAN
 26-27 FEBRUARY 2014
 SOFIA, BULGARIA 

Speaker Faculty – 2014 includes:

- John Vine CBE QPM, Independent Chief Inspector of Borders and Immigration, UK
- Police Brigadier General Gábor Kovács, EU Twinning Project, Hungarian National Police
- Captain Pierre Wuillemin, Head of Identification and Biometrics from BGC, Swiss Federal Customs Administration FCA, Border Guard Cops, Switzerland
- Adriano Baptista, Head of Operations Division, European Union Satellite Centre
- Petrus Neacsu, Head of Telecommunications Unit within Directorate for the Implementation of Integrated System for Border Security, Romanian Border Police.
- Peter Waldbauer-Hable, Senior Detective Chief Inspector, Bavarian Police and many others.

Plus, visit 2 interactive half-day conference workshops:

- **Inter Agency Intelligence Sharing**, by Neil J Hall AFNI MIACP, Assistant Commissioner of Police (Retd)
- **Stabilisation Operations in Fragile States**, by Malcom Kell, Stabilisation Advisor, UK Government's Stabilisation Unit

For more information about this event and how to register, contact **James Hitchen** (jhitchen@smi-online.co.uk, +44(0) 207 827 6054) or **Cem Tuna** (ctuna@smi-online.co.uk, +44(0) 207 827 6736).

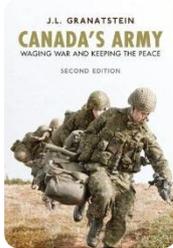
For sponsorship opportunities contact Sadia Malick, Director, via smalick@smi-online.co.uk or call +44(0) 207 827 6748.

Event's website: <http://www.smi-online.co.uk/2014eandp9.asp>

Contact for media-partners: Julia Rotar, jrotar@smi-online.co.uk, +44 (0) 20 7827 6088.

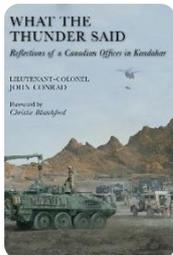


Canada's Army: Waging War and Keeping the Peace, Second Edition, by J.L. Granatstein



In this second edition of *Canada's Army*, J.L. Granatstein--one of the country's leading historians--brings his work up to date with fresh material on the evolving role of the military in Canadian society, along with updated sources and illustrations. *Canada's Army* traces the full three-hundred year history of the Canadian military from its origins in New France to the Conquest, the Revolutionary War and the War of 1812; from South Africa and the two World Wars to the Korean War and contemporary peacekeeping efforts, and the War in Afghanistan. Granatstein points to the inevitable continuation of armed conflict around the world and makes a compelling case for Canada to maintain properly equipped and professional armed forces.

What the Thunder Said: Reflections of a Canadian Officer in Kandahar, By Lieutenant-Colonel John Conrad, Christie Blatchford



By every principle of war, every shred of military logic, logistics support to Canada's Task Force Orion in Afghanistan should have collapsed in July 2006. There are few countries that offer a greater challenge to logistics than Afghanistan, and yet Canadian soldiers lived through an enormous test on this deadly international stage - a monumental accomplishment. Canadian combat operations were widespread across southern Afghanistan in 2006, and logistics soldiers worked in quiet desperation to keep the battle group moving. Only now is it appreciated how precarious the logistics operations of Task Force Orion in Kandahar really were. *What the Thunder Said* is an honest, raw recollection of incidents and impressions of Canadian warfighting from a logistics perspective. It offers solid insight into the history of military logistics in Canada and explores in some detail the dramatic erosion of a once-proud corner of the army from the perspective of a battalion commander.



Canada announces aviation agreements with 7 countries

Canada announced Tuesday a series of air transport agreements with seven countries that will result in more flight options and routes for its airlines.

In addition to more flights to and from the countries, the bilateral agreements will allow flights to accommodate passengers from partner airlines, in a process known as code-sharing, according to a statement. Agreements were reached with Algeria, Burkina Faso, Ethiopia, Macedonia, South Africa, Turkey and Ecuador.

"These relationships will provide more commercial opportunities to the Canadian air industry and are important for the competitiveness of our business and tourism sectors," Transport Minister Lisa Raitt said.

Elsewhere, Air Canada announced it is expanding its flights to Europe from Montreal, Toronto, Vancouver and Calgary beginning mid-2014.

Source: 2013 AFP, Agence France-Presse (AFP)

Rolls-Royce announces US aircraft engine contracts

Rolls-Royce, the British maker of aircraft engines, announced on Monday that it had won two maintenance contracts from the US government worth together up to \$496 million (365 million euros).

Rolls-Royce will provide parts and maintenance for thousands of T56 engines powering US military aircraft, under a six-year contract worth \$406 million, the company said in a statement. It has won also a five-year deal from the US navy worth up to \$90 million to deliver engine repairs to E-2 Hawkeye aircraft.

"These contracts demonstrate our continued success in supporting our customers and the thousands of Rolls-Royce T56 engines powering their operations," said Paul Craig, Rolls-Royce, President Defense Services.

"Our mission remains the same: to keep these fleets in the air as their operators require, and we will continue to focus on innovative solutions to provide affordable support for our customers," he added in the statement.

Source: 2013 AFP, Agence France-Presse (AFP)

Air France is being 'saved', heads for profits

A deep restructuring plan with big job cuts is rescuing French airline Air France, and the whole Air France-KLM group will become profitable by the end of the year, the group said on Monday.

Air France "is in the process of being saved," the head of the whole group Alexandre de Juniac told Europe 1 radio.

"Air France-KLM should make money from 2013 and Air France should do so in 2014, which means that we will have the means for development, to open new routes," notably in Africa, Asia and Latin America, he said.

Until now, the company had said only that Air France-KLM was being turned around from financial crisis. It had suggested in the six-month results that the group might be profitable by the end of the year.

In September, the number of passengers carried by the entire group rose by 0.7 percent but freight traffic again fell sharply, by 4.1 percent.

The Air France component, which celebrates its 80th anniversary on Monday but has been in difficulties since 2009, appears to be climbing towards brighter skies, having put in place a deep restructuring programme.

De Juniac said: "Air France is in the process of being saved but we have to do what we have said we will do.

"The staff are involved in an enormous plan. We have asked them to make a considerable effort. They have increased their working hours, they have increased their time in the air, they have changed their work methods."

In January 2012, the group launched a programme called "Transform 2015", to enable it to return to profit by 2015 and to put itself on a new, sound footing.

Under the plan, 1,826 people were to leave voluntarily, and in a second wave announced on Friday another 2,800 jobs will be shed.

The head of the Air France part of the group, Frederic Gagey, had said that the action was needed because Air France would not otherwise achieve its targets for ending losses in 2013 and would end up reporting an operating loss for the sixth year in a row.

Source: 2013 AFP, Agence France-Presse (AFP)

Japan Airlines orders 31 Airbus planes in \$9.5 bn deal

Airbus on Monday announced a \$9.5 billion deal with Japan Airlines, its first jet order from the carrier, challenging Boeing's dominance in the Japanese market as it struggles with the troubled Dreamliner.

The airline said it was ordering 31 planes -- 18 long-haul A350-900s and 13 A350-1000s -- with an option to buy another 25 aircraft.

The new planes are to come into service from 2019 as Japan Airlines (JAL) replaces its ageing Boeing fleet, in a blow for the US plane manufacturer.

Airbus chief executive Fabrice Bregier called the deal a "breakthrough" after the firm redoubled its efforts to penetrate a market long dominated by Boeing -- Airbus has a 13 percent share of the Japanese market.

"Just being in Japan wasn't enough," Bregier told AFP in an exclusive interview.

"We had to build and strengthen trust, prove that Airbus was a leading player, a world leader that has mastered its technology."

Investors cheered reports of the purchase earlier Monday with JAL's Tokyo-listed shares closing 3.01 percent higher at 5,810 yen. The deal was formally announced after markets closed.

The push by the European planemaker comes as JAL and domestic rival All Nippon Airways (ANA) -- whose fleet is also dominated by Boeing -- have been hit by problems with the Dreamliner.

The lightweight plane -- hailed for its fuel-efficiency but marred by years of production delays -- was grounded globally in January after lithium-ion batteries overheated on two different planes, with one of them catching fire while parked.

The Japanese carriers, which are the single biggest operators of the Dreamliner, have put their fleets back into service. But they are seeking compensation from Boeing for a string of problems which forced them to cancel hundreds of flights and dented their bottom line.

Despite a lengthy investigation, Boeing has not identified the root cause of the aircraft's battery problems, but said it put safeguards in place to prevent future incidents.

"Considering the recent troubles with the Dreamliner, JAL may have reached the conclusion that it wants to avoid the risks," said Mitsuru Miyazaki, senior analyst at Tokyo's SMBC Friend Research Center.

"The aviation sector is a global industry so it's natural that Japanese airlines want to secure multiple sourcing options."

However, JAL head Yoshiharu Ueki said the Dreamliner problems were "totally unrelated" to its decision to buy planes from Boeing's chief rival.

The carrier's president pointed to the A350's lightweight materials which help cut down on fuel costs, usually an airline's single-biggest cost -- a feature that Boeing played up with its Dreamliner.

"To put it simply, Airbus's A350 matched our expectations," Ueki said.

The value of the JAL-Airbus agreement is based on the planes' list prices, but airlines typically extract price cuts on big orders.

For Airbus, the deal marks a further push into the all-important Asia-Pacific aviation market, which it has predicted would overtake Europe and North America in air traffic by 2032.

Asian airlines have been on a buying spree. Three Chinese companies ordered 68 medium-range A320 aircraft in September, while Air China ordered 100 A320s in May for about \$8.8 billion.

Monday's announcement comes as JAL embarks on a route expansion after it rose from the ashes of bankruptcy last year to re-list on the Tokyo stock exchange. That followed an \$8.5 billion initial public offering, one of the biggest share sales in 2012.

JAL posted strong earnings after its re-listing, making it the most profitable airline in the world.

But a government bailout to save the carrier after it went bankrupt in 2010 has led to acrimony between Japan's biggest airlines, with ANA routinely criticising its rival's rescue package.

On Friday, JAL said it had lodged a complaint over Tokyo awarding twice as many lucrative landing slots at Haneda airport to ANA in an apparent attempt to level the playing field after the bailout.

Source: 2013 AFP, Agence France-Presse (AFP)

French defence minister talks deals in Saudi Arabia

French Defence Minister Jean-Yves Le Drian held talks on Monday with Saudi officials focused on cooperation in defence and armaments, SPA state news agency said.

Le Drian discussed with his counterpart, Prince Salman bin Abdul Aziz, who is also the crown prince, "ways to strengthen bilateral relations," SPA said.

France is negotiating large defence contracts with the oil-rich kingdom.

Le Drian said the Saudi side confirmed to him that a 1.1-billion-euro (\$1.49 billion) contract to overhaul four frigates and two refuelling ships, in service since the 1980s, had "entered into effect on October 7."

The work would involve French weapons and systems makers, DCNS, Thales and MBDA, he said in a statement.

Discussions are meanwhile ongoing regarding another contract that could amount to two billion euros (\$2.72 billion) for modernising Saudi air defences.

It would involve supplying Saudi Arabia with new generation Crotale surface-to-air rockets, produced by Thales.

Le Drian is on his third visit to Saudi Arabia since May last year.

Source: 2013 AFP, Agence France-Presse (AFP)