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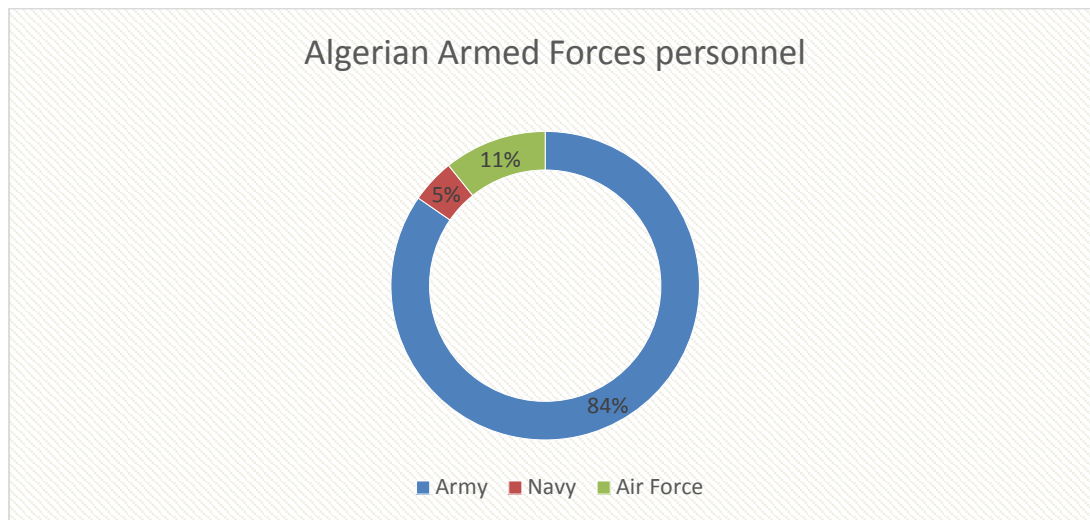
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Algerian Defence Budget and Future Procurements



The Algerian Armed Forces, consist of Land Forces (People's National Army - ANP), the Air Force (Algerian Air Force - QJJ), Naval Forces (Algerian National Navy - ANN), Air Territory Defence Forces (DAT), the Special Intervention Group (GIS) and the Algerian Security Forces (National Gendarmerie and the Republican Guard). According to the European Union of Institute for Security Studies, the Armed Forces, include some 130,000 personnel, constituting the strongest force in the African continent (See chart below).



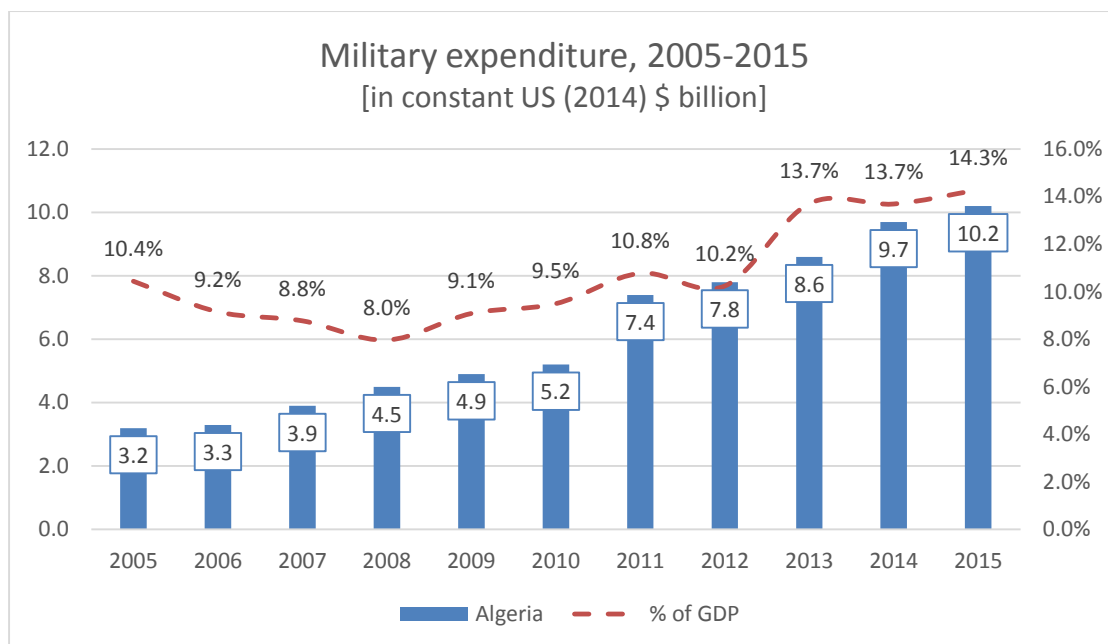
Source: http://www.iss.europa.eu/uploads/media/Brief_6_Algeria_s_army.pdf

Note: The above chart includes only three branches, as per the 'EU Institute of Security studies' segregation, compared to the segregation of the Algerian Ministry of Defence.

Since the fall of the Qaddafi regime in the neighbouring Libya, resulting in an extended disruption to the area and a significant increase of suicide attacks against its national security forces, Algeria was obliged to confront a new reality regarding terrorism.

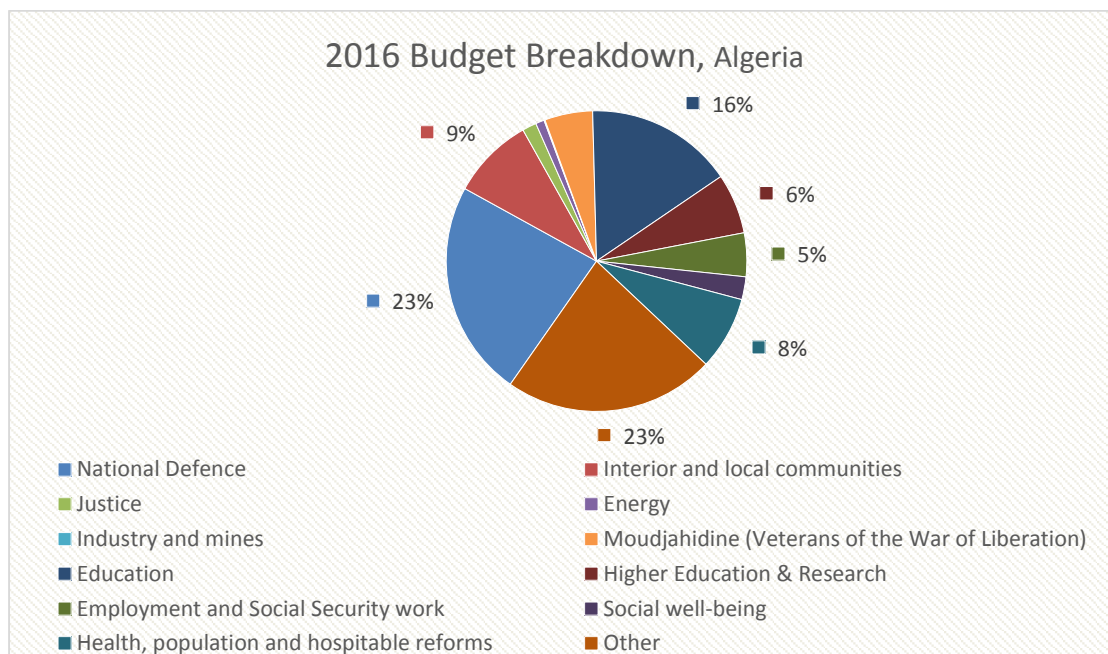
As a direct repercussion, from 2012 onwards, Algeria has taken actions to restructure and strengthen its national defence and security forces; under the sad ending of the hostage situation at a natural gas facility of the country (by terrorists and al-Qaeda) in early 2013, as well as the assassination of a French tourist in Algeria by the ISIL, these changes have been accelerated, reflecting into a significant military expenditure increase in absolute figures, as well as a percentage of the GDP of the country.

It is worth noting that Algeria since 2005, increased its Defence budget (in terms of constant US (2014) \$ billions), by some 219%. Investments in the modernization of the Forces equipment accounts for much of this increase in spending. Moreover, forecasts for the future, project a continuous increase that will elevate defence expenditure to about US \$16 billion, in 2020.



Source: <https://www.sipri.org/databases/armstransfers>

For 2016, the National Defence budget is expected to remain the same as for 2015, i.e. at some US \$ 10.2 billion (€9.02 billion), constituting the 23% of the overall Budget allocated for the year. In comparison, the second largest amount allocated by Algeria in its 2016 Budget in a ‘specific’ direction –namely some €6.16 billion- are to be spent on Education (See chart below).



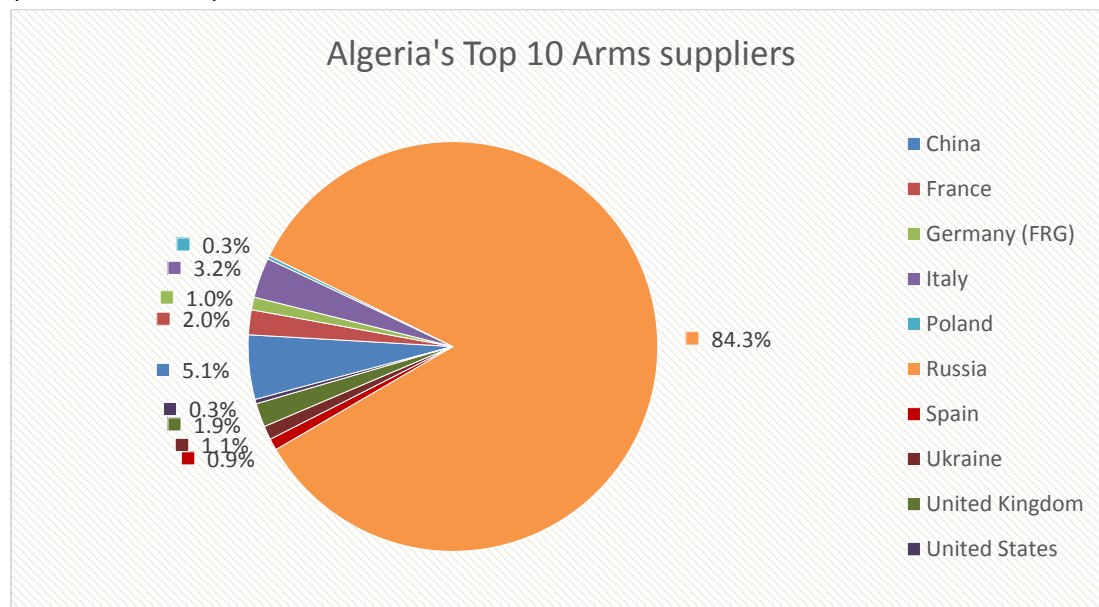
Source: <http://www.joradp.dz/FTP/JO-FRANCAIS/2015/F2015072.pdf>

Note: When hovering, appearing numbers are in (€) billion.

According to the Sipri database, arms imports by African nations have increased by 19% between the 2006-2010 and 2011-2015 periods. Of these nations, Algeria was still the largest importer (30%) –despite the overall decrease of imports by the country, by 18%-,

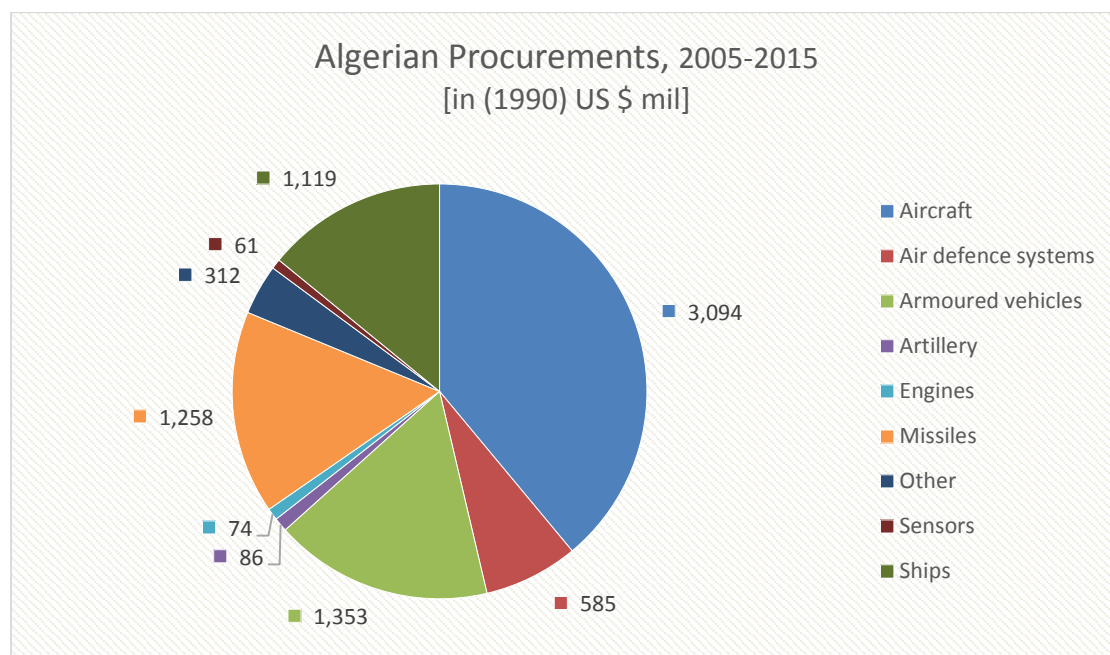
followed by Morocco (26%) and Uganda (6.2%). It seems that Algeria and Morocco compete with each other in an “unofficial” arms acquisition race, without so far creating military tensions in the region.

During the last decade, the main arms suppliers to Algeria were predominantly Russia (84.3%) – Algeria being overall one of the top three importers of Russian arms for the period, along with India and China-, followed by China (5.1%), Italy (3.2%) and France (2%), (See chart below).



Source: <http://armstrade.sipri.org/armstrade/page/values.php>

The main associated procurements for the period, included aircraft, armoured vehicles, missiles and ships (See chart below).



Source: <http://armstrade.sipri.org/armstrade/page/values.php>

In detail, in 2006, Algeria signed an arms deal with Russia (historically providing the 90% of the country's weaponry), of a value of US \$7.5 billion, that included various types of aircraft (40 MiG, 20 Sukhoi fighters and 16 Yak jet trainers), attack helicopters (Mi-28), submarines (Project 636, Improved Kilo class submarines), tanks and air-defence systems (40 T-90 tanks and 8 S-300 missile systems).

Moreover, in the 2010-2014 period, China exported 3 corvettes to Algeria (C82A), as well as an estimated 50 self-propelled guns (PLZ 45). Regarding its European suppliers, in 2014, the country received an amphibious landing platform dock (LPD) vessel -143 metres long, of 8,800 tons load displacement, and capable of carrying 600 people - from the Italian Fincantieri. In the same year (2014), Germany was awarded a contract to provide 926 Fuchs (Fox) 2 armoured personnel carriers (APCs) to Algeria; further, the first of the two multi-mission MEKO A-200AN frigates, were delivered by the German TKMS (ThyssenKrupp Marine Systems), in April 2016.

Finally, in 2015, Algeria signed a contract with IAPO (Irkut Corporation), for the provision of a further 16 Sukhoi Su-30MKA fighters, to be delivered in 2016 and 2017 –this batch will bring the total number of delivered aircraft for the country to 60. However, it should be noted that the country already has several outstanding orders and many weaponry deals have been “put on ice”, affected by the unexpected drop in oil prices.

It is worth noting though that presently, Algeria is particularly interested in drones, helicopters, self-propelled artillery, amphibious vessels and armoured vehicles. In complement to these, the Ministry of Defence is focusing on the acquisition of military equipment for the support of counter-terrorism (CT) operations, coastal surveillance, Search and Rescue (SAR), as well as anti-trafficking operations and cryptographic software.

However, there are still plenty of issues to be addressed with regards to related procurements; first of all, tenders related to national defence/security are restricted. Moreover, technology transfer should be placed at the forefront of associated procurement processes, by appropriate actions on the part of the government. Finally, related bureaucracy affecting the defence sector, delaying associated procedures, even with regards to the simplest decisions, should be eliminated.

Following a policy of amnesty and reconciliation and despite the several successful operations against Jihadism, Algeria has realized that its armed forces cannot defeat alone this belligerence, as well as other unpredictable risks. Therefore, Algeria has been an active member of the Global Counterterrorism Forum (GCTF) and a partner for Cooperation with the Organization for Security and Cooperation in Europe. Moreover, the country has been cooperating since 2010 towards the creation of a Joint Operational Army Staffs Committee (CEMOC) with Mali, Niger and Mauritania, against AQIM (al-Qaeda in the Islamic Maghreb). Finally, in 2013, Algeria and Tunisia formed a military cooperation committee to share intelligence regarding criminality and terrorist networks, as well as coordinate on border operations, training and security; this initiative has been viewed with some concern by Morocco.

Algeria: Defence Industry



Gathering momentum in recent years towards the development of a regional arms industry, the Algerian government has invested great efforts in building up an indigenous defence industrial base, always under the control of the Algerian Ministry of Defence; however, it does not seem yet to generate the expected earnings. To further reinforce the defence industry, as well as establish an international presence, several Algerian defence companies have signed agreements with international counterparts. Towards this direction, the Algerian government has promoted the creation of joint ventures, between domestic and foreign suppliers, through specific legislation; the “49/51” investment law (as discussed in previous, covering both military and commercial activities), is a fundamental part of this. Furthermore, while investors in Algeria are typically granted tax breaks and related incentives, there is an obligation under the 2009 Complementary Finance Law to reinvest equivalent sums within the country.

According to the above legislation, a list of indicative agreements between indigenous defence firms and international companies includes:

- The **Algerian Aerospace Company** (Enterprise de Construction Aeronautique - ECA) has been producing the Safir 43 light aircraft -local variant of the Czech Zlin Z 43-, through an industrial offsets agreement. Moreover, ECA has been reportedly contracted to produce locally the AgustaWestland AW101 Merlin and AW139 helicopters.
- **Mers El Kebir shipyard** was reported in 2013 to build landing craft vehicles, under license from Orizzonte Sistemi Navali.
- **Tawazun Holding** announced in 2012 that Groupement de la Promotion de l'Industrie Mécanique (GPIM), a company under the Algerian Ministry of National Defence' and NIMR Automotive, would produce UAE-designed armoured vehicles in Algeria as part of a JV, under licence from NIMR.
- Rheinmetall has formed **Rheinmetall Algérie** in March 2011 in partnership with Ferrostaal and various state bodies. The company's goal is to set up a production site for manufacturing Fuchs armoured transport vehicles. The first armoured transport vehicles are expected to enter production in the near future (2016), although certain key components will be shipped in from Germany. Currently (2016), the first vehicles for Algeria are leaving the factory hall. The planned factory, located about 400 km east of Algeria's capital Algiers, is to build nearly 1,000 armoured vehicles.

Other large defence companies of the country include:

- **National Industrial Vehicles Company** (Société Nationale des Véhicules Industriels - SNVI), a producer of trucks and buses, since 1967.

- **BCL** (Central Logistics Base), an armoured vehicle maintenance and construction complex (produces the armoured personnel carrier BCL M-5).
- **Enterprise for Naval Construction and Repairs** (Entreprise de Construction et de Réparation Navales - ECRN) which mostly provides maintenance and repair services, however also produces corvettes (Classe Djebel Chenoua) and patrol boats (Classe Kebir).
- **ERIS** (Seriana Company of industrial achievements), established in 1991, produces ammunition, spare parts and tooling, lightning rods, diesel generators, etc.
- **ECMK** (Khenchela Company of Mechanical Constructions), established in 1990, produces submachine guns, shotguns, pistols and spare parts and associated tooling.
- **ONEX** (National Diwan of Explosive Substances), established in 1976, produces hunting cartridges, ammunition, hand grenades, anti-tank mines and a number of explosive materials.

Finally, having learnt a valuable lesson from the embargo imposed on Algeria during the 1990's –that was only lifted in 2001- the Algerian army has invested great efforts in developing its own facilities for the maintenance of its military aircraft.

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](#)

Development of a tethered aerostat system for surveillance and reconnaissance purposes



A company with core competencies in Intelligence Surveillance & Reconnaissance (ISR), offering related consultancy services and training programs, wants to extend its business line with the development of a tethered aerostat system for reconnaissance and surveillance purposes. The company is seeking potential partners for the development, enhancement and/or marketing of the system.

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

Mail at: a-kintis@epicos.com


Development of structural composite parts using overbraiding technology for vehicles' ballistic protection



A company, which is a dedicated manufacturer of braided and woven fibres for composite reinforcement and advanced composites applications, is interested in developing structural composite parts for vehicles' ballistic protection. The company is an expert in the overbraiding manufacturing process, which is particularly well suited for circumferential products, like tubes or beams, and offers a number of advantages in comparison with filament winding, such as better crash properties and the possibility to produce more complex shapes. Furthermore, the company is highly experienced in the use of Aramid fibres, which increase the energy absorption capacity, as well as the damage tolerance of the components. Combining this knowledge and experience, the company is looking for a partner to develop structural composite parts for vehicle protection purposes, using its overbraiding production technology.

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

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News from our A&D Business Network**LEONARDO: Pakistan Strengthens Helicopter Fleet Renewal with Additional AW139S Order**

Leonardo announced today that the Government of Pakistan has signed a new order for an undisclosed number of additional AgustaWestland AW139 intermediate twin engine

helicopters. The aircraft will be used to perform utility, SAR (Search and Rescue) and EMS (Emergency Medical Service) operations across the nation. Deliveries are expected to start in early 2018.

The contract is a further step towards the completion of fleet renewal programmes spread over several batches plus logistic support and training. This event is a major achievement for Leonardo expanding the already successful presence of the AW139 model in the country. A fast growing fleet of AW139s is already in service in Pakistan, with several units operated by the Pakistan Government for relief and transport duties. The AW139 is the perfect fit to Pakistan's operational environment, delivering outstanding capabilities and hot&high performance unmatched by any other existing helicopter type in the same class.

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AAR Awarded 15-Year \$909 Million Landing Gear Contract by USAF



AAR has been awarded a \$909,394,297 fixed-price contract from the U.S. Air Force for the Landing Gear Performance-Based Logistics One program. Work expected to be completed by 2032. “This award is affirmation of AAR’s expertise and leadership position forged over 30 years in managing the repair, maintenance and logistics of landing gear,” said John Holmes, Chief Operating Officer, Aviation Services. “We are very honored to support the U.S. Air Force fleet and the critical missions they perform. We will work tirelessly every day to make them proud of their selection.”

AAR will provide total supply chain management including purchasing, remanufacturing, distribution and inventory control to support all Air Force depot and field-level, foreign military sales, other services, and contractor requisitions received for all C-130, KC-135 and E-3 landing gear parts.

“AAR is a strong fit to serve as prime on this contract because we can utilize our broad range of services and facilities across the country to not only overhaul landing gear for these three fleets but also procure and manage all the parts needed to keep them in service,” said Nicholas Gross, Senior Vice President, Government Supply Chain Solutions.

Repair work will be done at AAR’s landing gear services facility in Miami and inventory supply and management will be handled via AAR offices and warehouses in Wood Dale, Illinois, and Ogden, Utah.

“This contract is another great example of how AAR can apply commercial MRO and supply chain best practices to help the government increase efficiencies and decrease costs,” said David P. Storch, Chairman, President & CEO. “In this time of reduced budgets, government can rely on a trusted partner like AAR that has been providing aviation aftermarket services for more than 60 years.”

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France and the UK Launch Next-Generation Strike Missile Project with MBDA

Today in London, the United Kingdom and France have signed an agreement to launch a joint concept phase of the Future Cruise / Anti-Ship Weapon (FC/ASW) programme with MBDA. The agreement was signed by Laurent Collet-Billon, head of France's Defence Procurement Agency (DGA – Direction générale de l'armement), and Harriet Baldwin, UK Minister of Defence Procurement. Running for up to three years, the aim of the concept phase is to lay the ground work and inform the UK and France's decision making and requirements for a potential follow on assessment and demonstration phase of the next generation of cruise and anti-ship missiles, with a planned operational capability to be achieved by the end of the next decade.

Valued at 100 M€, work on the FC/ASW concept phase will be split 50/50 in terms of both quantity and quality of content between the UK and France. The effort will see MBDA mature systems and technologies that will increase the survivability, range and lethality of anti-ship and deep strike missiles launched by both air and naval combat platforms. The DGA will act as the contract authority for the concept phase with MBDA.

Equally funded by France and the UK, the FC/ASW programme is a product of the very close Anglo-French defence relationship set out by the Lancaster House treaties. The FC/ASW Concept Phase is the latest step in the two countries' highly successful collaboration on missile technologies through MBDA. This joint work has allowed the two countries to develop a range of world-class missile systems, such as Storm Shadow/SCALP, Meteor, Aster, and Sea Venom/ANL; to rationalise the development and production of missiles through the 'OneMBDA' organisation; and to harmonise the research and technology efforts of both nations across their entire missile industrial sector through the MCM-ITP (Missile Components and Materials – Innovation and Technology Partnership) programme. Harriett Baldwin said: "Our relationship with France is strong and enduring. We have a long history of cooperation in defence and security with our European Ally. As demonstrated by having Europe's largest defence budget, the UK is committed to European security and we will continue to collaborate on joint defence programmes across the continent. Today's agreement will sustain 80 jobs in the UK."

Laurent Collet-Billon said: "We are launching today a major new phase in our bilateral cooperation, by planning together a generation of missiles, successor to the Exocet, Harpoon, SCALP and Storm Shadow. The FC/ASW (future cruise/anti-ship weapon) programme's aim is to have by around 2030 a new generation of missiles. This future capability is strategic, industrially as well as operationally. This new programme will be the backbone of our "One Complex Weapons" initiative."

Welcoming the news, Antoine Bouvier, CEO of MBDA, said: "This agreement secures the strategic autonomy of France and UK's deep strike capabilities for the future. After the

ratification last year of the Anglo-French agreement authorising us to operate OneMBDA centres of excellence, the FC/ASW project opens the next page of MBDA's European strategy. Through this strategy we aim to work in even closer partnership with our domestic military customers in order to converge their requirements, while streamlining our own industrial processes across borders. Only this form of co-operation will allow European industry to continue delivering exceptional products and sustain the long-term critical mass needed to keep providing Europe with independent access to key sovereign technologies."

Dave Armstrong, Managing Director of MBDA UK and Group Director of Sales and Business Development, added: "FC/ASW represents the future of deep strike capability in Europe. The programme is of strategic importance to MBDA, who will lead a team gathering industrial champions from both nations, and will ensure that the UK and France remain at the cutting edge of missile technologies well into the future."

For Further Information [Click Here](#)

Source: Epicos, MBDA

Northrop Grumman to Provide Full Spectrum of Capabilities to US Army for New D3I Contract

The U.S. Army Space and Missile Defense Command has named Northrop Grumman Corporation (NYSE: NOC) a recipient of the Design, Development, Demonstration and Integration (D3I) contract. Under the D3I Domain 1 contract the U.S. Army can provide task orders to the winning contractors for efforts supporting the warfighter. As an awardee of the contract, Northrop Grumman is one of eight companies who will exclusively bid on those task orders under the umbrella of D3I.

A unique procurement strategy for the U.S. Army, D3I offers the opportunity for a capability to be designed and produced as a Joint Capability Technology Demonstration (JCTD) sponsored through the Joint Capability Integration and Development System (JCIDS) process. This allows the Army and contractor to provide low-rate initial production capability releases to the warfighter on an accelerated timeframe, greatly decreasing the acquisition process and ensuring availability of mission-critical capabilities to our nation's armed forces.

"Northrop Grumman is proud to be named as a recipient on this one-of-a-kind program," said John Parker, vice president and general manager, global logistics and modernization, Northrop Grumman Technology Services. "Our pursuit of this program represents a highly successful enterprisewide collaboration effort, bringing together the most cutting-edge capabilities and technologies for future customer missions from all areas of our business, at an affordable price."

The Northrop Grumman team's broad spectrum of offerings under D3I cover future needs in directed energy, space, cyberspace, hypersonics, and integrated air and missile defense.

For Further Information [Click Here](#)

Source: Epicos, Northrop Grumman

Honeywell Leads \$243 Million Infrastructure Modernization Project at Tinker Air Force Base, Largest Performance Contract in Air Force History

Honeywell and the U.S. Air Force this week announced a \$243 million facility modernization project at Tinker Air Force Base in Oklahoma City that is expected to reduce energy consumption by 23 percent and save the base \$20.5 million in energy and operational costs each year. It is the largest energy savings performance contract (ESPC) ever awarded by the Air Force. The project is a joint effort among Tinker, Honeywell, the Defense Logistics Agency Energy, Headquarters Air Force Materiel Command and the Air Force Civil Engineer Center.

The project will focus on improvements to production facilities at the Oklahoma City - Air Logistics Complex (OC-ALC), which employs more than 9,000 people and is one of three air logistics complexes operated within the Air Force Sustainment Center (AFSC), Air Force Materiel Command (AFMC). The work will be funded through a 21-year ESPC awarded to Honeywell by the Defense Logistics Agency Energy. The ESPC will enable the Air Force to fund upgrades using annual energy and operational savings that are guaranteed by Honeywell, eliminating the need for any upfront capital investment by the Air Force.

Once the project is complete, the improvements are anticipated to save the Air Logistics Complex more than \$626 million in energy and operational costs over the life of the project. In the first year alone, the base is expected to save more than \$6.7 million in energy expenses and \$13.4 million in operational costs.

"We are honored to be home to the largest energy retrofit project in Air Force history," said Brig. Gen. Mark K. Johnson, OC-ALC commander. "This is a big milestone for Tinker Air Force Base and the Air Force in our journey to achieving operational efficiency, and we thank both the Secretary of the Air Force Leadership and Honeywell for making this achievement possible. In addition to increasing productivity, the improvements will also make us more competitive in the private sector for aircraft maintenance work through decreasing our energy costs."

The project focuses on upgrading infrastructure and industrial processes at the base's production facilities to make the buildings more energy and operationally efficient. The work includes:

- Modernizing manufacturing lines to eliminate wasted ventilation and increase worker safety
- Updating wastewater treatment systems to provide equipment control and alarm monitoring
- Installing two new 2,000-ton chillers to increase the reliability of the cooling system
- Upgrading paint booths to reduce energy used by the painting process
- Decentralizing the steam heating plant with a distributed heat system to lower energy use
- Installing more efficient LED lighting with wireless controls
- Installing smart meters to more closely monitor and track building energy consumption

Additionally, Honeywell will integrate new buildings on the base into Tinker Air Force Base's existing Honeywell Enterprise Buildings Integrator (EBI) building management system that manages and controls heating, cooling and metering equipment. After the upgrades are completed, Honeywell will provide ongoing maintenance and service to building systems.

"Beyond saving energy and lowering operating costs, this is an opportunity to modernize Tinker Air Force Base's industrial operations," said John Rajchert, president of Honeywell Building Solutions. "Honeywell is pleased to partner with the Air Force in this endeavor and help them achieve operational excellence through software, energy and industrial process upgrades. This project is not only a big win for Honeywell, but also for the U.S. government, military and taxpayers as we drive sustainability in our country by improving the infrastructure to boost operational and energy efficiency."

This latest project builds on previous Honeywell work at Tinker Air Force Base. To date, the base has reduced overall energy use by approximately 37 percent and saved approximately \$12 million in annual energy and operating costs.

For Further Information [Click Here](#)

Source: Epicos, Honeywell

Harris Corporation Achieves Critical Delivery and Cost Savings Milestones for F-35 Avionics

Harris Corporation (NYSE-HRS) has achieved major cost savings and delivery milestones for avionics supporting the F-35 Lightning II, the world's most advanced multi-role fighter aircraft that provides unmatched capabilities to military forces around the world. Harris avionics infrastructure and electronics are critical to providing more efficient, affordable and higher-performance capabilities on a fighter aircraft than ever before.

Since the beginning of the F-35 program, Harris has worked with industry partners to deliver more than 780,000 items with 99.8 percent on time accuracy. This includes vibration isolated and liquid cooled avionics racks and power supplies for all the aircraft mission systems; network interface units that enable fiber optic data communication between mission subsystems throughout the aircraft; phased array antennas and datalinks that ensure encrypted and secure communication between aircraft; and lightweight pneumatic carriage and release racks that support the aircraft's low observable profile.

Since its first deliveries of avionics, Harris has implemented affordability initiatives that have reduced the avionics ship set cost for each aircraft by 64 percent. In addition, Harris has provided modular components and common parts to 21 other F-35 suppliers resulting in more than \$750 million in cost savings over the life of the production program.

As part of every aircraft, Harris delivers more than 1,500 module components, 58 network interface units, 21 power supplies, 7 integrated racks, 6 advanced antenna arrays, and 3 antenna interface units.

"Harris has a strong tradition of on-time and accurate delivery of avionics components and modules for the F-35," said Jeff Babione, executive vice president and general manager of the F-35 Program at Lockheed Martin. "Our collaborative efforts will continue to deliver strong capabilities, on budget and on time, to ensure our warfighters continue to maintain global air superiority."

"By investing our own resources and continuing to search for innovative solutions, Harris is driving results that deliver value to the customer and warfighter," said Ed Zoiss, president, Harris Electronic Systems. "We value our long-standing partnership with the F-35 program team providing engineering and supply-chain excellence."

For Further Information [Click Here](#)

Source: Epicos, Harris Corporation

EPI signs support contract for TP400 engines powering Malaysia's A400M military aircraft

Europrop International GmbH (EPI) has signed an In-Service Support (ISS) agreement with the Malaysian government for the TP400 turboprop engines powering the Royal Malaysian Air Force's A400M military transport aircraft, at the 2017 Langkawi International Maritime & Aerospace Exhibition (LIMA). The agreement was signed by Christophe Bruneau, President of EPI, and Dato' Sri Abdul Rahim Mohamad Radzi, Secretary General at the Malaysian Ministry of Defense.

This contract follows a Memorandum of Agreement (MoA) signed on March 21 by EPI and Global Turbine Asia (GTA), a Malaysian joint venture with Safran that provides maintenance, repair and overhaul (MRO) services for helicopter and airplane engines.

EPI and GTA provide support services for the TP400 engines' fleet powering the Royal Malaysian Air Force's four A400M airlifters. The first phase of the contract runs until the end of October 2017, leading to the second phase, when GTA will become the prime contractor for these support services.

Under the terms of the agreement, EPI and GTA will provide local support services. GTA's Subang facility already deploys a Customer Support Representative (CSR), Field Support Representatives (FSR) and Logistics Support Representatives (LSR) to ensure that the Royal Malaysian Air Force continues to receive timely support for their engines.

"We are delighted to continue to build a successful partnership with GTA, which enables us to provide local support for the TP400 engine fleet," said Christophe Bruneau, President of EPI.

EPI will support GTA to obtain Approved Maintenance Organization (AMO) certification from EPI, as well as certifications from the European Aviation Safety Agency (EASA-Part145) and the Malaysian airworthiness authority DGTA.

For Further Information [Click Here](#)

Source: Epicos, Safran