

BUSINESS COMMUNITY
AERONAUTICS, SPACE, SECURITY, DEFENSE
TECHNOLOGY



Future Fit 2020

Agoria strengthens its
operational structure :
business communities,
centers of expertise,
public policy groups





Chairman: Christ'l Joris (CEO ETAP S.A.)

CEO: Paul Soete (Marc Lambotte as of 22/05/2014)

**A MULTI-SECTORIAL FEDERATION OF
TECHNOLOGICAL INDUSTRIES**



AGORIA

➤ Employer's federation of the technology industry (biggest member VBO-FEB)

➤ <i>Creation</i>	1946
➤ <i>Members</i>	1700 companies 80 % SME's 900 foreign daughtercompanies
➤ <i>Own personnel</i>	190
➤ <i>Employment</i>	275 000 employees 12% of the Belgian private sector
➤ <i>Turnover</i>	EUR 70 billion
➤ <i>Added value</i>	10% of the private sector
➤ <i>Export</i>	74% (exportpercentage) 1/3 of the Belgian export

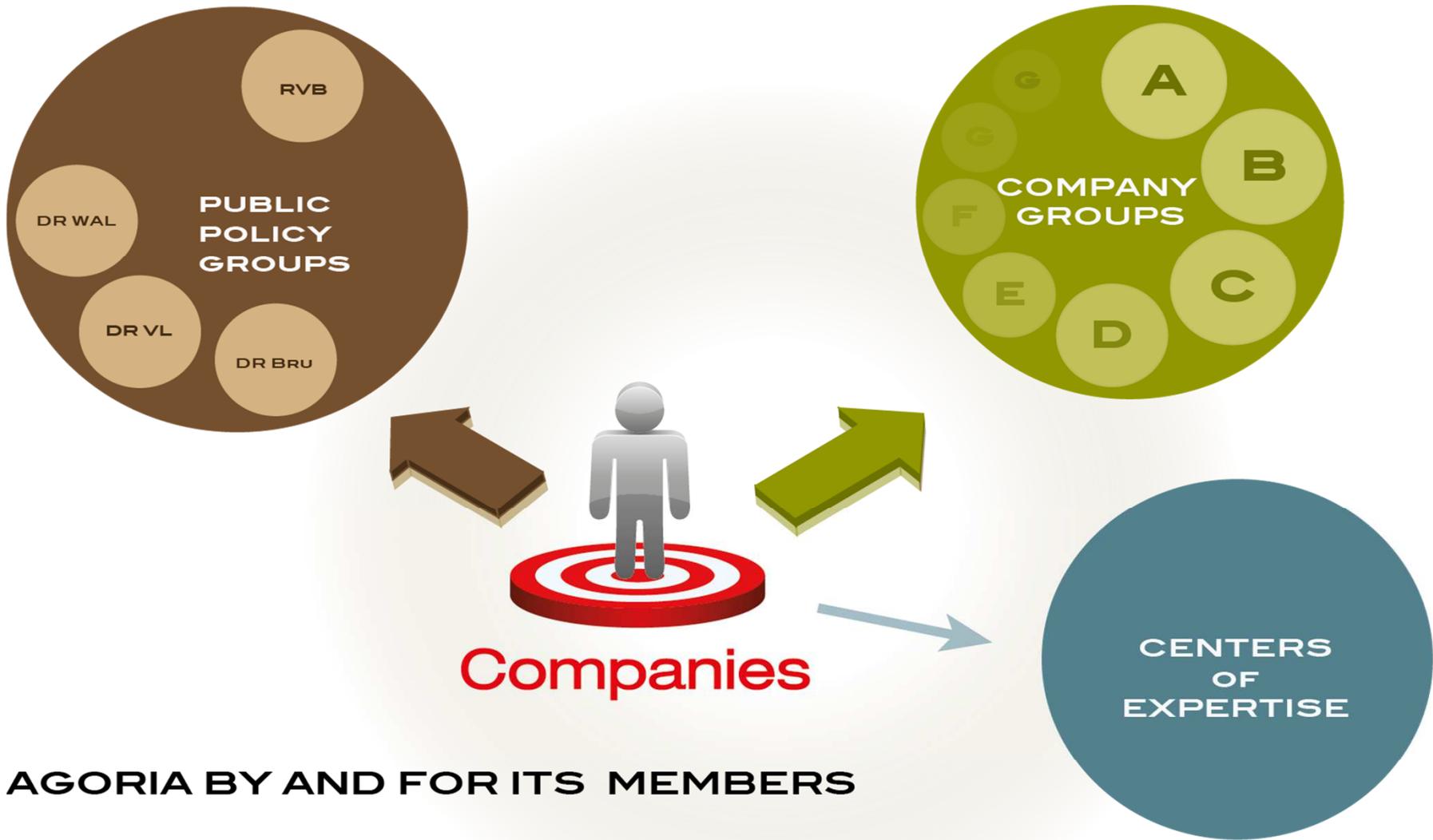
200 specialists at your service

- | ict
- | building technology
- | contracting
- | materials technology
- | subcontracting
- | production technology & mechatronics
- | transport systems & solutions
- | energy systems & solutions
- | environment systems & solutions
- | aeronautics, space, security, defence technology
- | international business
- | Factories of the Future
- | Smart Cities
- | Public Infrastructure



- | energy
- | innovation
- | environment
- | regulation & standardisation
- | talent & labour market
- | social affairs
- | federal
- | brussels
- | flanders
- | wallonia

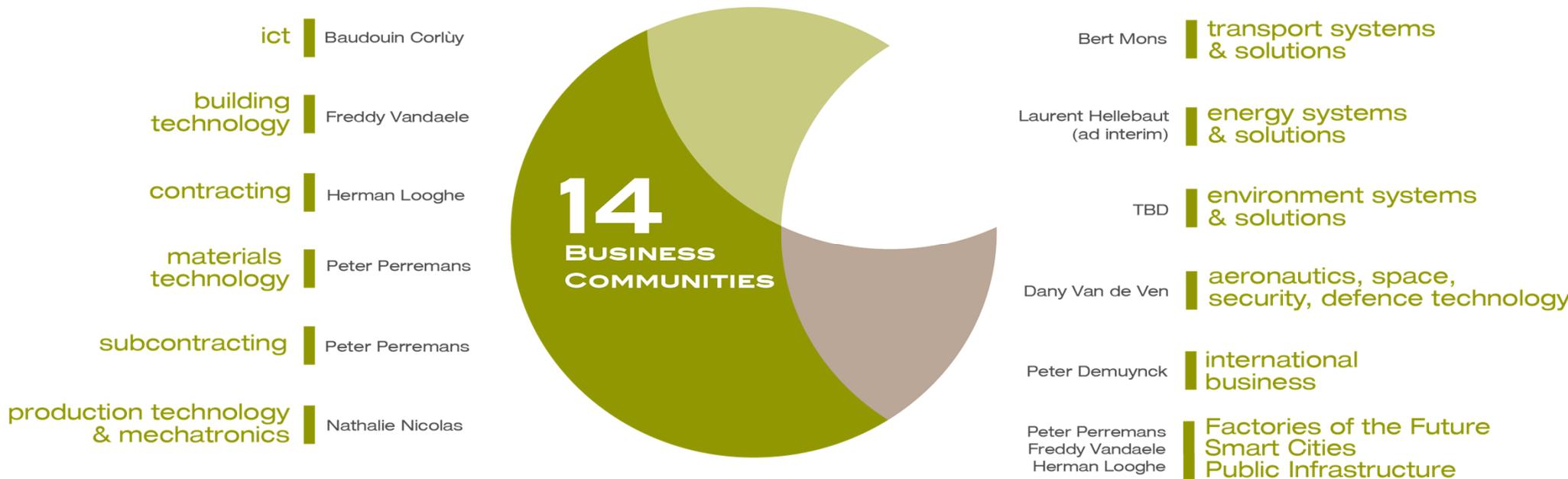




AGORIA BY AND FOR ITS MEMBERS

**MEMBER REPRESENTATION
IN THE ORGANIZATION**

Business groups categorized in 12 business communities



The members choose their groups - 46

Gereedschapsmachines - Transmissies - Pompen en compressoren - Industrial automation -
Burgerlijke bouwkunde - Landbouwmachines - Textielmachines- Machines voor voeding en farmacie -
Industriële ovens - Water, Lucht, Bodem - Cars, trucks, buses, coaches - Bicycles - Trailers,
semi-trailers & bodies - Rail- & tramwaystock - Ship builders & ship repairers - Contracting &
maintenance - Montage & kranen - TPMA - Metaalbewerking - **Aeronautics** - **Security & Defence** -
Space - ICT - Non-ferro - Gieterijen - Verwerking van kunststoffen en composieten -
Metaalproducten - Building structure - Heating, cooling & ventil. - Electrical installations equipment
- Office, retail & warehouse design - Elevators - Home automat. & safety & secu. - Lighting -
Green building Platform - Nucleaire installaties - Hernieuwbare energie - Platform
Energie – Environment Systems & solutions – Aluminium Platform -

+ Common Projects & International Business Development

Support of international business development

 **BANKINGTECHNOLOGY CLUB**
Powered by Agoria - The Federation for the Belgian Technology Industry

 **CARBON ENERGY CLUB**
Powered by Agoria - The Federation for the Belgian Technology Industry

 **BELGIAN SPORTSTECHNOLOGY CLUB**
Powered by Agoria and BOIC 

 **INFRASTRUCTURE CLUB**
Powered by Agoria - The Federation for the Belgian Technology Industry

 **RENEWABLE ENERGY CLUB**
Powered by Agoria - The Federation for the Belgian Technology Industry

 **FOOD TECHNOLOGY CLUB**
Powered by Agoria - The Federation for the Belgian Technology Industry

 **MEDICAL TECHNOLOGY CLUB**
Powered by Agoria - The Federation for the Belgian Technology Industry



Symatex

Belgian Textile Machinery Association

Belgian Security & Defence Industry

Vieilles Tiges de Belgique - 13/02/2014

www.agoria.be

Dany Van de Ven

BELGIAN SECURITY AND DEFENCE INDUSTRY



- President: Freddy Versluys (CEO OIP & SABIEX)
- Director: Roland Teheux (Dany Van de Ven)



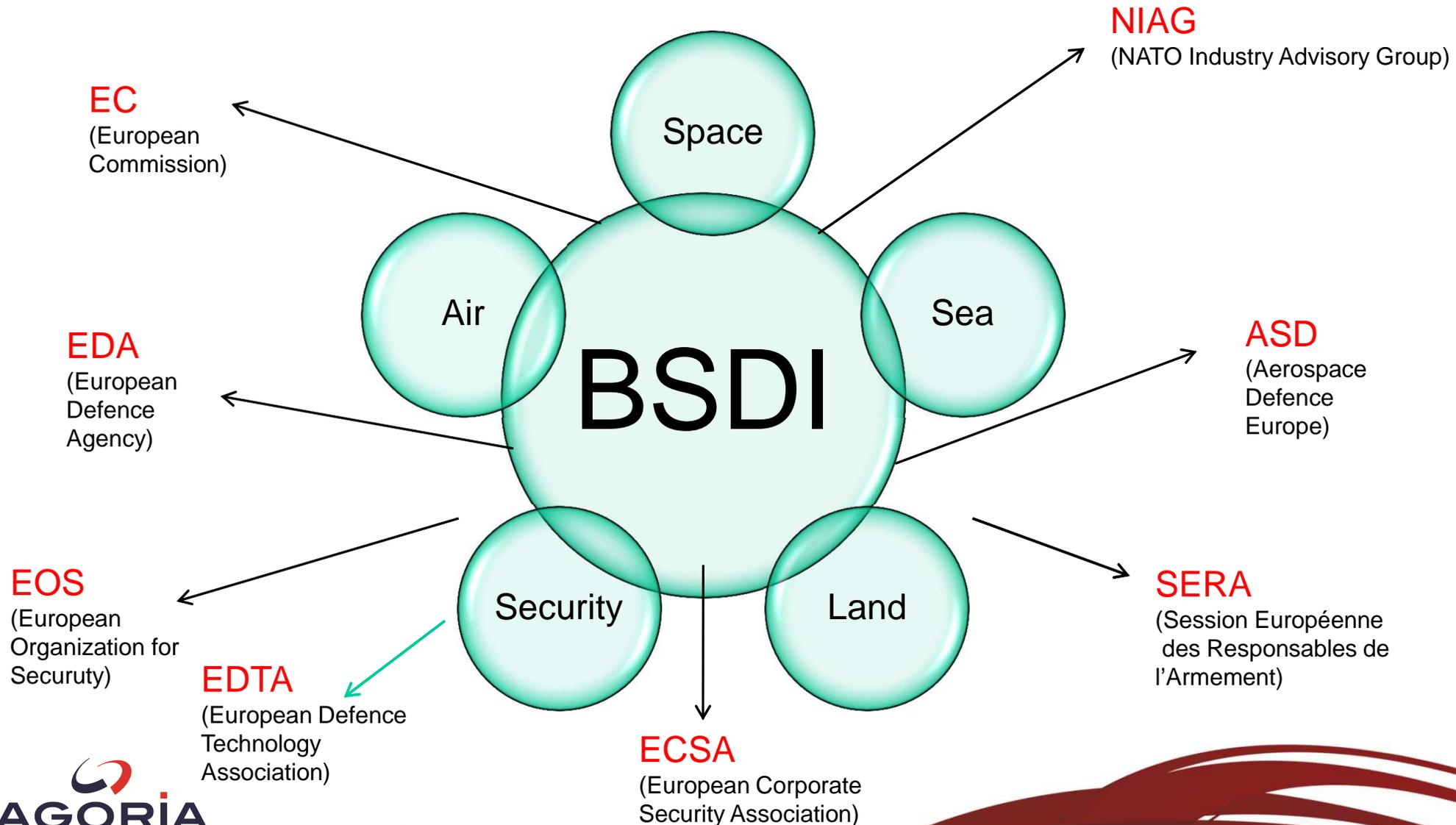
Background



- > Created in 1989
 - > At the request of:
 - > Belgian authorities
 - > National Armament Director (NAD)
 - > Belgian Industrials
- > Group of 36 companies
 - > SMEs & Subsidiaries
- > Representing 90% of the Defence Industry
- > More than 90% to exportation



Belgian, European and International Concepts for Security & Defence



BSDI The Belgian Security & Defence Industry

- > The Belgian Security & Defence Industry (BSDI) association represents the national security and defence industry. As such, its main objectives are to safeguard and promote the member companies as well as their products and services, both at home and abroad.
 - > **Competitiveness**
 - > The Belgian Security and Defence Industry is well known for its high level of technology, quality, and management skills acquired over the years from its involvement in international cooperation programs with European and international partners.
 - > **Small Countries**
 - > Small countries certainly have an active role to play in European cooperation on defence equipment and systems, not only as buyers, but also as suppliers or co-suppliers. An intelligent sharing of roles and capabilities certainly helps the stable development of cooperation in Europe. Historically, small countries have often contributed to the ambitions of Europe by providing the flexibility and realism that make it possible.
 - > **International Cooperation**
 - > It is quite clear that Belgium must increasingly cooperate with foreign industries if it wants to take part in supplying modern, cost-effective systems. The BSDI supports all initiatives that move in this direction, whether they focus on research and technologies, security of supply, intra-regional exchanges or development and production programs.



BSDI The Belgian Security & Defence Industry



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Areas of Activities of Members



- > Telecommunication systems
- > Aeronautical and Space Systems
 - > Airframes with metallic and composite structures
 - > Wiring assemblies and optical fibers
 - > Propulsion systems and launchers
 - > Avionics (displays and communication systems)
 - > Satellite payloads and ground systems
- > Protective clothing and equipment
- > Weapons and ammunition
- > Night vision systems, optics, optronics & battle management systems
- > Composite materials
- > Land mobility (armoured vehicles, tracks and wheels)
- > Flexible containers
- > Software solutions
- > ...



Figures

- > Members: 36 and growing
- > Employment: 15,000
- > Turnover: 1,5 billion euro
- > Export: 90 %



Promotion Through BSDI



- > Briefings
- > Lectures
- > Contact with other Associations
- > Missions
- > Cooperation MOU BSDI-US NDIA dtd 24/06/2010
- > Contact with International Fora
- > ...



International Fora



- > European Defence Agency ([EDA](#))
- > AeroSpace and Defence Industries Association of Europe ([ASD](#))
- > European Corporate Security Association ([ECSA](#))
- > Session Européenne pour les Responsables d'Armement ([SERA](#))
- > NATO Air Industrial Advisory Group ([NIAG](#))
- > NATO Air Forces Armaments Group ([NAFAG](#))
- > ...



Exhibitions

- > Representing the Belgian Industry at International and National exhibitions and expositions
 - > FIDAE (Chili): Mar/Apr 2008 & 2010 & 2012 & 2014
 - > Eurosatory (France): Jun 2008 & 2010 & 2012 & 2014
 - > Defence Days (Belgium): Jul 2008
 - > Air Shows:
 - > Koksijde Air Base: Jul 2009, Jul 2011
 - > Beauvechain Air Base: Sep 2010
 - > Florennes Air Base : Jun 2012
 - > Kleine Brogel Air Base (Sanecole) : 13/14 Sep 2014
 - > IDEX (UAE): Feb 2009 & 2011 & 2013 & 2015
 - > LAAD (Brazil): Apr 2009 & 2011 & 2013 & 2015
 - > IDEF (Turkey): Apr 2009 & 2011
 - > DSEi (UK): Sep 2009 & 2013 & 2015
 - > MILIPOL (FR): Nov 2009 & 2011 & 2013
 - > INFOPOL : Apr 2013



Actions



> For National Defence Programmes

- > Aiming to safeguard the global interest of Belgium to:
 - > Promote products “made in Belgium”
 - > Convince Belgium MOD that outsourcing is also a good solution for Belgian armed forces
 - > Strive for industrial participation

> For Co-operative Defence Programmes

- > The Belgian authorities bearing the economic responsibility play an important part in international negotiations related to co-operative programmes.



A Few Missions Utilizing Members Products



- > Indonesia: Dec 2007
- > Poland: Oct 2008
- > South Africa: Jan 2009
- > Bulgaria: Oct 2009
- > Maroc: Apr 2010 (Jun-Jul 2010)
- > Indonesia : Nov 2011
- > Vietnam : Sep/Oct 2014
- > ... - Malaysia – Singapore – Turkey – India...



A few examples of defense “expertise”

F16 with SABCA, SONACA, PW BEC,...

Piranha IIIC with OIP, CMI Défense,...

http://www.youtube.com/watch?feature=player_detailpage&v=a7ejJfpJ61g

FN303 Less Leathal Weapon with FNH

http://www.youtube.com/watch?feature=player_detailpage&v=8qyLLSpDu-w



Aeronautics + Space

www.agoria.be

Figures

Number of members

61 (increasing)

Workforce

6600 people

Turnover

1,7 billion euro

Export

94%

- **Activities of our members**

- satellites
- rockets
- navigation (Galileo)
- telecommunication
- technological research
- maintenance/modification of airplanes/components
- logiciels
- training
- ...

- **some members**
 - Asco
 - Barco
 - LMS International
 - Sabca
 - Sonaca
 - Spacebel
 - Techspace Aero
 - Thales Alenia Space
 - Qinetiq Space
 - Sabena Technics
 - Tech4Jet (JetairFly)
 - CAE/SFA
 - SNECMA SERVICES
 - Lufthansa Technik
 - ...

- **Belgian landscape for Aeronautics**

- Federal : AGORIA – Sector Aeronautics
- Federal : BSDI (Belgian Security & Defence Industry)
- Flanders : FLAG (Flemish Aerospace Group) - AGORIA Vlaanderen
- Wallony : EWA (Entreprises Wallones Aéronautiques) – AGORIA Wallonie
- Brussels : BAG (Brussels Aeronautical Group)

Sector					
Industrial/Technological Associations	Aviation (Aeronautics)		Security and Defense		Space
EUROPE	ASD		ASD		ASD (EUROSPACE)
BE-FEDERAL	AGORIA/Aeronautics		AGORIA/Security & Defense		AGORIA/Space
BE-FEDERAL	(AGORIA/Sector Aeronautics as POC for ASD) BSDI		BSDI		BELGOSPACE
BE- REGIONAL	FL	FLAG		-----	VRI
	BR	BAG		-----	BRUSPACE
	WA	FWA* (SKYWIN)			WALLONIE ESPACE*

- **European landscape for Aeronautics**

- ASD (AeroSpace Defence Europe) :

- 16 major European aerospace and defence companies and 27 member associations in 20 countries
 - 752.000 employees – 186,8 Billion Eur
 - For Belgium are member : AGORIA/Sector Aeronautics and BSDI
 - Regio's are not represented as such

- EDA (European Defence Agency)

- For Belgium : AGORIA/BSDI

- **European landscape for Space**

- Representation at ASD/EUROSPACE through

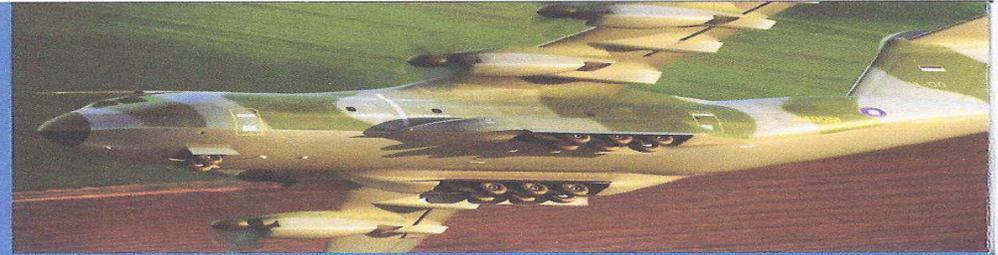
- some of its members : SABCA and Thales Alenia Space Belgium (ETCA)

- EDA (European Defence Agency)

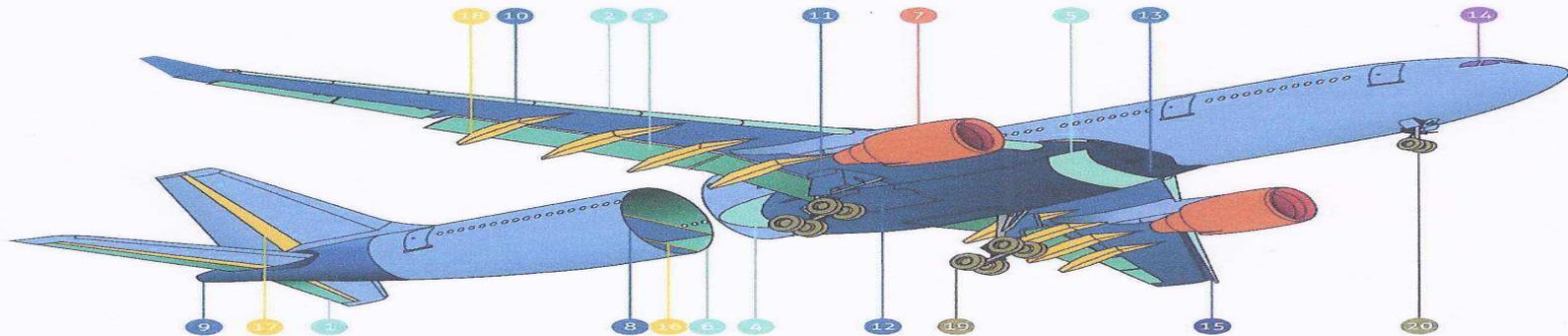
- For Belgium : AGORIA/BELGOSPACE

- **NATO landscape for Aeronautics**
 - NIAG (NATO Industry Advisory Group)
 - For Belgium : AGORIA/BSDI

A few examples of Belgian aeronautical “expertise”



SKYWIN SHARE IN CIVIL AIRCRAFT PARTS



MAIN COMPONENTS

Sonaca
Leading edges, slats flaps & tracks

1 2 3

Composite fuselage parts

4 5

Fuselage frames and beams

6

Techspace Aero

Engine boosters

Lubrication groups

7

SABCA

Cabin floor, Wing box

Tail cone, main gear doors

8 9 10 11 12 13

Thales Belgium
Cockpit communication systems

14

Technical Airborne Components

Bodsair

Carbon fiber rods

15

Hexcel

Honeycomb sandwich panels

16 17 18

Bridgestone Aero

Rechapping wheels

19 20

INDUSTRIAL PARTS

Britte-Mustad
High precision metallic components

Capaul

High precision machining for engine

components

Coexpair

Composites engineering, equip-

ments and tools

Dumoulin Herstal Machining of

metallic components, surface

treatments

Feronyl

Injection in plastics & composite

materials

Mecasoft

High precision components

Electro-erosion

Mocket

Manufacturing of high precision

components

Precimetal

Manufacturing of metallic

components

Shur-Lok

Fasteners, nuts and fittings

Simonis Plastic

Plastic parts

Sobelcomp

Innovative composite parts

Vanhulen

Compression, traction & torsion

springs

A few examples of Belgian space “expertise”



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Conclusion/Challenges

1. Small but smart (SME's)
2. Niches oriented industry climbing to “system integrators”
3. Watch out for “regionalization”
4. Export licenses is a regional responsibility...
5. Dual use is complicating the matter
6. EC Directives are eliminating “offset”
7. Issue of Big Countries/Companies against Small Countries/Companies
8. ...

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www.agoria.be/belgospace

www.agoria.be/bruspace



F16 replacement

- Belgian F16 replacement : 2023-2028
- Identified candidates :
 - Eurofighter – F18 – F35 – Gripen - Rafale
- Creation of BSDI/AWG
(Belgian Security & Defence Industry/Aeronautical Working Group) :
 - 4 associations : BSDI-FLAG-BAG-EWA
 - 8 companies :
 - ASCO, BARCO, SABCA, SABENA TECHNICS
 - PW BEC, SONACA, TECHSPACE AERO, THALES
 - Invitees : Cabinet MOD – DGMR/Sys – Air Component Commander – PFS Economy
 - 2 meetings : 07/11/2013 – 15/01/2014
 - Next meeting : 11/03/2014

F16 replacement

➤ BSDI/AWG TOR (Terms Of Reference)

➤ Aim of BSDI/AWG

- to elaborate an industrial participation business plan (IPBP) that is based on the return of activities that can be expected by the Belgian industry at the occasion of the procurement of the successor of the Belgian F16 aircraft by the Belgian Defence. The IPBP will list the companies identified, and the type of products/service/technologies which are under consideration. Work shares do not belong to this IPBP.
- to promote, in collaboration with the Belgian Defence, the succession of the F-16 towards the public authorities on the basis of the established IPBP.
- at the occasion of the contractual phase as well as in the follow-on support phases, to assure the industrial participation (return) as foreseen in coordination with the public authorities.

F16 replacement

- Aim of Belgian Industry
 - To get industrial participation
 - With employment
 - With technology

F16 replacement

- Next Governmental declaration :
“F16 needs to be replaced with
Belgian industrial participation”