

AEROSPACE
INDUSTRY
IN **TUNISIA...**



INVEST IN **TUNISIA**



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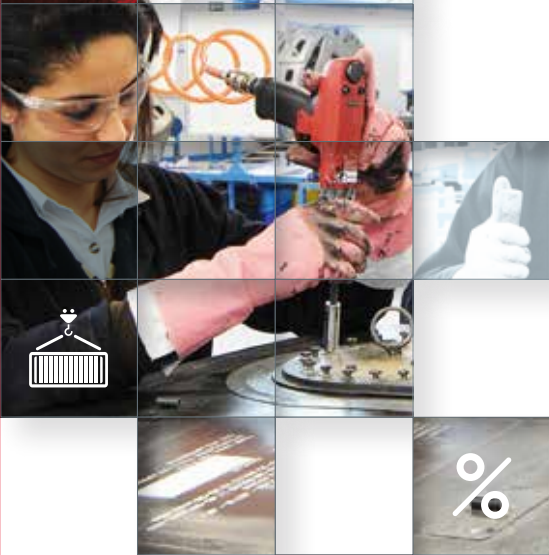


A BOOMING INDUSTRY

65
companies



9,000
Jobs



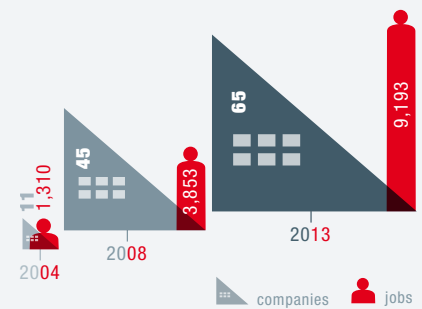
4
clusters

Aerospace industry in Tunisia is experiencing a real boom over the last decade illustrated by:

- 65 companies set up in 4 industrial clusters employing over 9,000 people,
- high added value activities such as: engineering and design, electronics, wiring, casting, machining and precision engineering, sheet metal cutting, assembly of aero-structures, plastics, composite, surface treatment and painting, equipment and aviation systems manufacture as well as aircraft maintenance,
- 2/3 of production exported to the European Union market,
- imports are aircraft, production tools and raw materials (aluminum plates, ingots and bars, copper alloys, plates and rubber sheets, composites, etc).

France is ranked **first** as prime contractor in Tunisia employing **90%** of the total workforce in this sector followed by Italy, the UK and the US.

Development of the number of companies and jobs



Several major groups have chosen Tunisia to develop their businesses in the field of aerospace industry such as:

AEROLIA ■ SOGECLAIR AEROSPACE ■ AERO STANREW ■ HUTCHINSON ■ LACROIX ELECTRONICS ■ SABENA TECHNICS ■ LATELEC (LATECOERE) ■ ZODIAC AEROSPACE ■ FIGEAC AERO ■ CORSE COMPOSITES AERONAUTIQUE ■ MECACHERS AEROSPACE...



15
centres

PRODUCTIVE AND SKILLED HUMAN RESOURCES

The training programme tailored to the needs of the aerospace industry generated reactive and multidisciplinary qualified human resources thanks to:

- 15 sectoral training centres in various areas in compliance with international standards;
- the Centre of Excellence for Aerospace Industry Professions “CEMIA”;
- the training providers in higher education, with partnerships between Tunisian and French engineering schools providing training programmes focused on aerospace industry and leading to a double degree;
- a training centre specialised in aerospace industry located in El Mghira industrial park dedicated to the areas of mechanics, electronics and computing.

COMPETITIVE LABOUR COSTS

At comparable levels of qualification, Tunisia offers competitive labour costs in proportions ranging from 1 to 5 compared to European countries. As an indication; the salary of a junior engineer is roughly 600 Euros and that of a junior higher technician is of 350 Euros.

A QUALITY TECHNOLOGICAL INFRASTRUCTURE

In addition to airport, maritime, road and telecommunications infrastructure where Tunisia is among the most modern in Africa, the country also features a quality technological infrastructure.

Hence, Tunisia has the following facilities:

- an aerospace industrial park at El Mghira representing an industrial platform spanning over 200 hectares;
- the competitiveness cluster of Sousse consisting of a Technology park, an offshore area and an industrial zone;
- two operational economic activities parks with high quality services: the park of Bizerte and that of Zarzis;
- about one hundred industrial zones spread all over the territory.

A PERFORMING SUPPLY-CHAIN: ACTIVITIES AND KNOW-HOW

The intent of Tunisian authorities, in synergy with the involved manufacturers and the Association of Tunisian Aerospace Industries "GITAS" established in 2006, is to work on developing a Tunisian aerospace industry "supply chain".

A range of technology intensive activities requiring an enhanced know-how is perfectly controlled by subcontractors in Tunisia at the following levels:

- **engineering:** software development, electronic components;
- **manufacturing:** electrical system and wiring, composite materials, casting, mechanical precision machining, sheet metal cutting and sheet metal work, assembly of aero-structures, plastic parts, surface treatment and painting ...;
- **services:** engine repair, transformation, modification, maintenance and other services.

MEI: A PERFORMING SUPPORT SECTOR

Mechanical and electrical industries are a support sector for aerospace industry. It comprises 1,000 companies and over 110,000 employees. As top export sector, the MEI represent a share of 35% of overall Tunisian manufacturing exports.

AN ATTRACTIVE INCENTIVE FRAMEWORK

Tunisia offers investors who choose to establish their businesses in the country:

- the freedom to invest in the aerospace components sector with the possibility of holding up to 100% of the project capital and to repatriate profits and proceeds from the sale of the capital invested in foreign currencies;
- an investment incentives code granting various benefits in terms of exemption from taxes and duties as well as investment subsidies and grants;
- several bilateral and multilateral trade agreements.



110,000
employees



1,000
companies



SUPPORT INSTITUTIONS AT THE SERVICE OF THE INVESTOR

Various institutions provide investors with active support and help such as: The Association of Tunisian Aerospace Industries (GITAS), The Foreign Investment Promotion Agency (FIPA – Tunisia), The Agency for the Promotion of Industry and Innovation (APII), The Centre for the Promotion of Exports (CEPEX), The Centre for Mechanical and Electrical Industries (CETIME).

INVESTMENT OPPORTUNITIES

Opportunities to be seized in the following niches:

- **Equipment Manufacturing:** converters, battery chargers, wound elements, motors, generators, power transformers, measuring instruments ...
- **Wiring:** assembly of sub-assemblies, board assembly ...
- **Precision Machining and Mechanics:** castings in special alloys based on cobalt, nickel and stainless steel, precision mechanics;
- **Sheet Metal:** structural assemblies, structural riveting, shaping (CN folding, assembly, riveting, TIG welding);
- **Assembly of aero-structures:** aircraft assembly;
- **Plastics Manufacturing:** injection of engineering thermoplastics, service and maintenance of molds, integration of electrical and electromechanical sub-assemblies, wire cabling...;
- **Surface Treatment and Painting:** chemical chromating of aluminum (Surtec 1200 and Alodine 650) passivation of stainless steel, black and colorless anodic sulfuric oxidation;
- **Engineering and Design:** Embedded software for computers, inertial central test bed, avionics equipment simulators.

“We trust our staff, from top to bottom of the hierarchy. They work independently, with great commitment. This is the result of social dialogue, incentives for growth, the possibility of letting ideas and talents emerge.”

Mr. Gaby LOPEZ,
Director of ZODIAC EQUIPMENTS TUNISIA,
march 2013



FIPA
Tunisia

APII

CEPEX

CETIME



WINGS IN THE TUNISIAN SKY

Hundred years after the non-stop crossing of the Mediterranean by Roland Garros on board his mythical monoplane from Saint-Raphael to Bizerte (Tunisia), a second passage and a second landing of the aircraft's replica took place on 22nd September 2013.

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