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The Korean Market
for Defence Products

Prepared by:
Canadian Embassy

Canada

External Affairs and
International Trade Canada
Affaires extérieures et
Commerce extérieur Canada



Prepared by the Canadian Embassy
Seoul, Korea

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July 25, 1994



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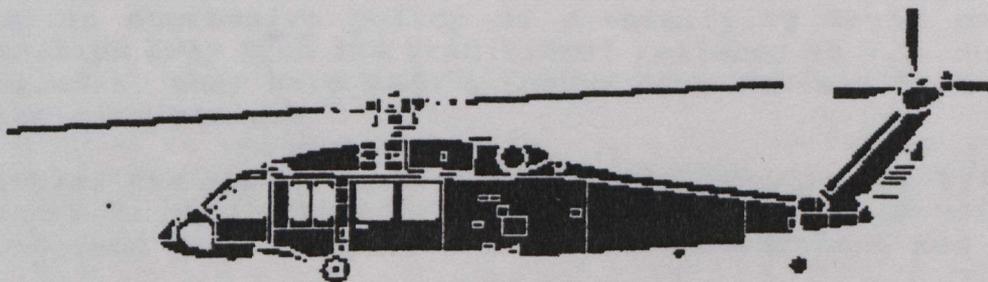
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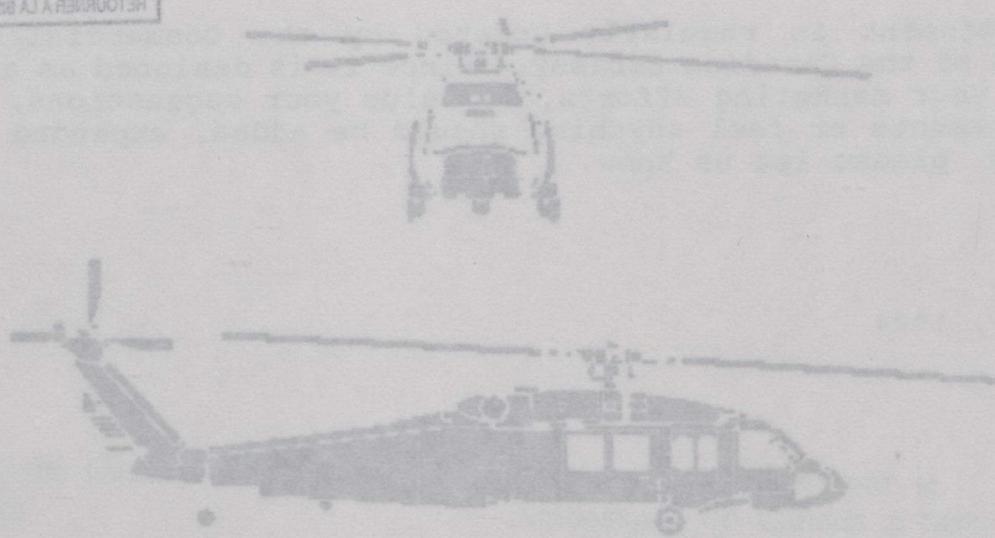
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KOREAN MARKET DEFENCE PRODUCTS

TABLE OF CONTENTS

This paper is intended to provide an overview of Korean defence procurement policy and procedure (including industrial offsets), as well as an introduction to the most significant programs that are currently underway or planned. The paper also contains information on Korea's main aerospace and defence products companies. page

The emphasis in Korea's defence policy is changing from labour-intensive to a corresponding shift taking place from the traditional dominance of the Army to a more ascendant status for the Air Force and the Navy. This change appears to have several causes. First, to maintain and modernize the Korean forces, it is more difficult to compensate for relatively low levels of sophistication in its equipment. As well, the Korean forces have to prepare to assume sophisticated tasks such as electronic surveillance in anticipation of a possible conflict. Another important factor in the changing nature of the Korean forces is the need to prepare to deal with any potential threats from Korea's historical antagonists, Japan, China and Russia. In this regard, the Republic of Korea is looking beyond the unification of the Korean peninsula to the development of a more advanced and diversified defence systems.

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The United Nations Command in Korea has long stressed the need for interoperability, i.e. that Korea should only buy what the U.S. supplier of aircraft. Lockheed Corporation, for example, is filling a contract valued at U.S. \$5.2 billion for the co-development of the F-16 fighter jet. This indicates that the U.S. share of foreign purchases is still significant.

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For example, the Korean Air Force took delivery in May 1994 of its first non-U.S. manufactured transport aircraft, the CN-235M medium transport from CASA of Spain. The Korean Government has also

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KOREAN MARKET FOR DEFENCE PRODUCTS

This paper is intended to provide an overview of Korean defence procurement policy and procedure (including industrial offsets), as well as an introduction to the most significant programs that are currently underway or planned. The paper also contains information on Korea's main aerospace and defence products companies.

The emphasis in Korea's defence policy is changing from labour-intensive forces to a greater reliance on advanced weaponry. There is a corresponding shift taking place from the traditional dominance of the Army to a more ascendant status for the Air Force and the Navy. This change appears to have several causes. First, as Korea has advanced economically, it has become more difficult to maintain an Army that relies on large numbers of troops to compensate for relatively low levels of sophistication in its equipment. As well, the Korean forces have to prepare to assume sophisticated tasks such as airborne electronic surveillance in anticipation of the withdrawal of the U.S. Armed Forces from Korea. Another important factor in the changing nature of the Korean forces is the long term preoccupation of the Republic of Korea with preparing to deal with any potential threats from Korea's historical antagonists, Japan, China and Russia. In this regard, the Republic of Korea is looking beyond the unification of the Korean peninsula as it plans the acquisition of sophisticated defence systems.

Korea's weapons procurement budget was about U.S. \$6.5 billion in 1991, with approximately one-quarter of that amount designated for foreign weapons systems. Less than three-quarters of the foreign purchases were of U.S.-made goods, down from 90% in 1985. Although more recent official data are not available at this time, sources at the Defense Logistics Agency indicate that the U.S. share of foreign purchases has fallen to about 50%.

The United Nations Command in Korea has long stressed the need for "inter-operability", i.e. that Korea should only buy what the U.S. Forces use. Indeed, the U.S. is still overwhelmingly Korea's major supplier of aircraft. Lockheed Corporation, for example, is filling a contract valued at U.S. \$5.2 billion for the co-production and off-the-shelf delivery of F-16 fighters. Other sectors of the Korean military, however, particularly the Navy (which accounts for about one-third of foreign arms purchases), are pursuing an aggressive policy of diversifying their purchasing relationships away from the traditional reliance on U.S. suppliers. In particular, they have made a number of purchases from European and Israeli companies.

For example, the Korean Air Force took delivery in May 1994 of its first non-U.S. manufactured transport aircraft, the CN-235M medium transport from CASA of Spain. The Korean Government has also

announced that it will purchase from Britain the advanced combat-control software system for the Naval destroyers that are being built under the KDX Program. BAE-Sema Ltd. will supply its SSCS (Surface Ship Combat System) MK7, partly in cooperation with the Korean firms Samsung Electronics and Goldstar Precision. Another area of cooperation between European and Korean firms is in the construction of the ROK Navy's fleet of submarines. Several submarines have been purchased directly from Germany, and the rest of the fleet is being constructed in Korea with German technical assistance.

One reason for Korea's move to reduce its reliance on U.S. defence suppliers appears to be that the country's commitment to acquiring advanced technology in areas such as electronic warfare has run up against restrictive export policies within the U.S. Government. There is a perception that access to advanced technologies is more readily available from European sources than from the U.S. Another significant reason for the inroads that have been made into the Korean defence products market by non-U.S. suppliers is simply that in many cases they have been pursuing market opportunities in Korea more aggressively than their American counterparts.

The Korean market has taken on particular significance for many defence products suppliers because it is one of the few growth areas in the world. Korea's defence procurement budget is still growing at about 9% annually in real terms.

Although the Republic of Korea is looking beyond the reunification of the peninsula as it makes its long term strategic plans, the country nevertheless remains technically in a state of war with the Democratic People's Republic of Korea, a totalitarian, personality cult state which claims dominion over the entire peninsula. Incidents with the North Korean military along the demilitarized zone, some of them fatal, are not unusual.

As a result of the tense conditions on the peninsula and the fact that Korea is still formally in a state of war, it is very difficult to obtain information concerning Korean defence procurement programs. Foreign companies find obtaining access to even basic, routine information related to military projects very difficult.

The Korean Ministry of National Defense is a very closed organization which maintains tight control over all of its information for national security reasons. For example, even organization charts and telephone lists are not available to outsiders.

Defence procurement is shrouded in mystery and budget allocations are not published. This makes it imperative that any company that is interested in selling to the military obtain the services of a proven defence sales agent. A well connected agent is usually able to obtain details on projects which would otherwise be unavailable to foreigners. The Canadian Embassy can in many cases advise on the reputation and capabilities of a defence products agent.

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Larger Canadian defence products companies should also consider establishing full-time sales representatives in Korea. Representation through Hong Kong or Japanese agents should be avoided.

Canadian companies should also be aware that major U.S. firms are in many cases present in Korea with well staffed offices to serve both the U.S. Forces here and the Korean Ministry of National Defense. Those Canadian firms with a business connection through U.S. affiliates may find this a useful means of obtaining sales support.

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Chung-ku, Seoul 100-060
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Fax: 773-1878

47th Fl., DLI 53 Bldg.
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Citicorp Center Bldg.
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Northrop Corporation
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Changwon 641-600 Korea
Tel: 0551-84-7998
Fax: 0551-84-4668

Raytheon Overseas Ltd., Korea
Rm. 501, Kukje Center Bldg.
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Seoul 140-702
Tel: 796-5797
Fax: 796-5790

Teledyne
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Yongsan-ku, Seoul 100-635
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Fax: 796-2468

United Technologies Int'l Operations
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Tel: 785-1930
Fax: 785-1932

Other foreign suppliers are also well represented in Korea. The U.K. Embassy has a full time sales representative from the Ministry of Defence, and Ferranti International and British Aerospace have in-country representatives here. The French Embassy has three officers with military and aviation sales responsibilities.

announced that it will continue to sell its products in Korea. Larger Canadian defence products companies should also consider establishing full-time sales representatives in Korea. Representation through Hong Kong or Japanese agents should be avoided.

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U.S. Defence Related Firms with Offices in Korea

Allied-Signal Int'l Inc. Suite 1603, Kyobo Bldg. 1, 1 Ka, Chongro, Chongro-ku, Seoul Tel: 734-6052/4 Fax: 734-6055	Bell Helicopter Korea Inc. 1st Fl., Han Jong Bldg. 788-2/3, Yeoksam-dong, Kangnam-ku Seoul 1135-600 Tel: 587-1928/9 Fax: 588-6091
Boeing International Corp. Suite 1605, Daehan Bldg. 51-1, Namchang-dong, Chung-ku, Seoul 100-060 Tel: 773-2491 Fax: 773-1878	General Dynamics Int'l Corp. 47th Fl., DLI 63 Bldg. 60, Yoido-dong, Youngdungpo-ku Seoul 150-763
Honeywell PTE Ltd. Citicorp Center Bldg. 89-29, 2 Ka, Shinmun-ro, Chongro-ku, Seoul 110-062 Tel: 723-5411 Fax: 722-7297	Hughes Aircraft Int'l Service Co. Rm. 1606, Kyobo Bldg. 1, 1 Ka, Chongro, Chongro-ku Seoul 110-714 Tel: 734-4783/4 Fax: 734-4785
Lockheed Aircraft (Asia) Ltd. Daewoo Foundation Bldg. 526, 5 Ka, Namdaemun-ro, Chung-ku, Seoul 100-095 Tel: 757-4593/5 Fax: 757-3730	McDonnell Douglas Korea Ltd. 12th Fl., Dong Won Bldg. 946-12, Daechi-dong, Kangnam-ku Seoul 100-095 Tel: 557-2161 Fax: 557-4233/4244
Northrop Corporation P.O. Box 57, Changwon 641-600 Korea Tel: 0551-84-7998 Fax: 0551-84-4666	Raytheon Overseas Ltd., Korea Rm. 601, Kukje Center Bldg. 191, 2 Ka, Hangang-ro, Yongsan-ku Seoul 140-702 Tel: 796-5797 Fax: 796-5790
Teledyne Rm. 403, Nam Song Mansion 260-199, Itaewon-dong, Yongsan-ku, Seoul 100-635 Tel: 795-2717/9 Fax: 796-2468	United Technologies Int'l Operations 52nd Fl., 63 DLI Bldg. 60 Yoido-dong, Youngdungpo-ku Seoul 150-010 Tel: 785-1930 Fax: 785-1932

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The "MOA" is a document detailing obligations and understanding necessary for the execution of the offset program between the and the FC involved.

KOREAN PROCEDURES WITH RESPECT TO DEFENCE PROCUREMENT AND INDUSTRIAL OFFSETS

The main priority of the Korean Government's offsets policy is the acquisition of advanced military and dual-use civilian technologies. In general, the Ministry of National Defense applies an offset program requirement to any military procurement that involves the spending of more than U.S. \$5 million in foreign exchange. The requirement exists with respect to all foreign purchase projects and licence production projects. It also applies to all research and development projects that involve the expenditure of foreign exchange exceeding U.S. \$5 million.

The goal of each offset program is to obtain at least 30% of the total contract value in industrial benefits, with an emphasis on direct offsets. ("Direct offset" involves technology transfer or buy-backs that are directly related to the military equipment or materiel procured from the foreign contractor. "Indirect offset" involves technology transfer or buy-backs which are not directly related to the military equipment or materiel procured from the foreign contractor.) According to the Ministry of National Defense, the existence of the offset program is not to be a factor in determining prices, although this assertion is not entirely realistic.

Offset program proposals are considered on a competitive basis. The results of the evaluation of the proposed offset programs are an important factor in the selection of the final contractor.

The following two tables describe the procedure for defence procurement from a foreign supplier and for defence production under licence from a foreign supplier. For the purpose of the tables, the abbreviations below are used:

MND	Ministry of National Defense
DLA	Defense Logistics Agency
FC	Foreign Contractor
KIP	Korea Industrial Partner
MOU	Memorandum of Understanding
MOA	Memorandum of Agreement
TAA	Subcontract/Technical Assistance Agreement
RFP	Request for Proposal

"KIP" selection is made by the MND, based on its evaluation of the capabilities of domestic companies, as well as on the recommendation that it receives from the DLA. The recommendation from the DLA to the MND is based on its evaluation of the offset proposal and the recommendations of domestic companies that are submitted by the FC.

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The "MOA" is a document detailing obligations and understandings necessary for the execution of the offset program between the DLA and the FC involved.

The "TAA" is a subcontract or a technology transfer agreement between the FC and the domestic company involved, which is drawn up for the purpose of specifying offset obligations and their fulfilment.

The "MOU" is a document specifying the rights and obligations between the FC and the domestic company with respect to the offset program.

PROCEDURES FOR DEFENCE PROCUREMENT FROM A FOREIGN SUPPLIER	
MND	Provides to DLA master plan for offset program and general guidelines for MND's offset requirements
DLA	Issues Request for Proposal to foreign contractors
FC	Submits an outline of offset proposal and recommendation of domestic company
DLA/FC	Notifies FC of the domestic company selected by MND upon DLA's recommendations
KIP	Notifies selected domestic company of MND's offset requirements and outline of offset proposal
FC	Surveys domestic company selected by MND and submits following for negotiations: (1) MOA with detailed offset proposal; (2) one copy of main contract quotation; and (3) desirable dates for negotiations
KIP	Submits master plan for offset participation to DLA
DLA/KIP/FC	Negotiate on MOA and offset proposal
FC	Submits MOU made between FC and domestic company to DLA
DLA	Reports the results of negotiations to Working Level Committee for Offset Evaluation
	Reports to MND the evaluation results with initialled MOA, attached proposal and MOU
MND	Analyzes the evaluation results with regard to selection of equipment and approves the MOA
DLA	Signs MOA and notifies FC and the party concerned (end-user and KIP)
FC	Submits TAA to DLA
FC/KIP/END-USER	Reports quarterly the results of performance to DLA
DLA	Notifies the Confirmation of Performance report to FC and to domestic company

BACKGROUND

KOREAN AEROSPACE INDUSTRY

PROCEDURES FOR LICENCE PRODUCTION	
MND	Provides offset project of licence production with selected domestic company to DLA
DLA	Issues RFP to foreign contractor
	Provides general guidelines for negotiation with MND's offset requirements to domestic company
FC	Submits a detailed proposal and MOA to DLA
KIP	After negotiating with FC about delegated matters, domestic company shall report the results of negotiations with a plan of licence production
DLA/FC	Negotiate and modify the result of KIP's negotiations
KIP	Submits MOU and subcontract made between foreign contractor and domestic company to DLA
DLA	Reports the results of negotiations to working level committee for offset evaluation
	Reports the evaluation results with initialled MOA and proposal
MND	Analyzes the results of evaluation and approves the MOA
DLA	Signs MOA and notifies foreign contractor and the party concerned
FC/KIP	Report quarterly the results of performance to DLA
DLA	Notifies the confirmation of performance reports to foreign contractor and domestic company

In September 1993, Korea and China concluded an agreement for the joint development of an observation and communications satellite which will be seven times larger than the 50kg Uribyol II. This satellite, tentatively named Uribyol III, is to be launched in 1997. It has been reported that Korea intends to acquire a capability to develop and build satellites independently, based on the technology with respect to medium sized satellites that it expects to acquire from the joint project with China. Scientists and engineers from Korea and China are expected to begin work on the joint project at the Taedok science town in Taejeon this year.

In November 1993, Hyundai Electronic Industries announced that it had concluded an agreement with Space Systems/Loral of the U.S. for the transfer of technology relating to the design, development, manufacture and testing of satellites. Hyundai also reported that the two companies had agreed to tender joint bids for Korean and other satellite projects. Under the technical cooperation agreement, Hyundai said that it would be allowed to participate in Space Systems' Globalstar project which is intended to provide telecommunications services through a global network of satellites.

The companies principally engaged in satellite communications work are Hyundai Electronics, Samsung Aerospace, Daewoo Telecom and Goldstar Information and Communications.

Aircraft

Although there is extensive production of aircraft components in Korea, only one project has actually been carried out from start to finish here. That is the design, development and construction of the Changgong-91, a five-seat light aircraft that was developed under the leadership of the Korea Institute of Aeronautical Technology, an institution that is run by Korean Air. The Changgong-91 received its airworthiness type approval from the Korean Ministry of Transportation in August 1993, and the consortium that built the aircraft is now looking for markets within Korean as well as abroad.

The Korean Government is examining the possibility of concluding bilateral airworthiness agreements with the U.S. and Japan in order to facilitate exports of the Changgong-91, as well as civilian aircraft that Korea intends to produce in the future.

At the same time that it announced its plans to develop a medium sized multi-purpose satellite, the Korean Government also declared its intention to create the prototype for a twin turbo prop regional aircraft by 1988. The code name for this project is the "Phoenix".

During May and June of 1993, a ten-person study team led by the Korea Aerospace Research Institute (and including representatives of Samsung, Daewoo, Korean Air and the Halla Group) visited a number of aircraft manufacturers in North America and Europe principally for the purpose of identifying potential joint venture partners in the project. Although the report of the study group is not expected to be available until the end of this year, it is understood that CASA, ATR, IAI and Jetstream Aircraft are the favoured prospective partners.

The structure and the prospects of the proposed Korean consortium remain somewhat unclear. It seems, however, that if the project proceeds, it will include Samsung, Korean Air and Daewoo, together with one overseas manufacturer. As well, the Korean Government has indicated an intention to use aerospace firms in the former Soviet Union as sources of affordable technology. The Government announced at the outset of the project that it would contribute at least U.S. \$400 million, although nothing has been heard from the Government concerning this project for some time.

BACKGROUND

KOREAN AEROSPACE INDUSTRY

Set out below is a general review of the current Korean aerospace initiatives. Some of the ways in which the Korean Government intends to upgrade this country's aerospace capabilities are the following.

- technology transfer under the U.S. \$5.2 billion Korea Fighter Program (F-16)
- an aggressive program of encouraging risk-sharing partnership agreements between Korean companies and aerospace firms abroad
- the hiring of design teams in the former Soviet Union to bolster existing Korean design capabilities
- licensing and other technology transfer arrangements with advanced foreign aerospace firms

Satellites

To date, 2 Korean satellites (Uribyol I and II) have been placed in orbit, the first in August 1992 and the second in September 1993. The mini-satellites, which weigh about 50kg each, were both launched aboard Ariane rockets and are intended to assist in weather observation and communications tests. Both satellites had more foreign than Korean content, although the Korean content in the second satellite (which was contributed by Samsung Aerospace and 16 other domestic suppliers) was up sharply from the first project.

As part of the aerospace industry development plan that was announced by President Kim Young Sam in March 1993, the Government has stated its intention to develop a multi-purpose communications satellite that can be launched into low orbit by 1997.

In September 1993, Korea and China concluded an agreement for the joint development of an observation and communications satellite which will be seven times larger than the 50kg Uribyol II. This satellite, tentatively named Uribyol III, is to be launched in 1997. It has been reported that Korea intends to acquire a capability to develop and build satellites independently, based on the technology with respect to medium sized satellites that it expects to acquire from the joint project with China. Scientists and engineers from Korea and China are expected to begin work on the joint project at the Taedok science town in Taejon this year.

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During the current period of uncertainty about the Government-sponsored Korean aircraft consortium, individual firms in this country are proceeding to form their own alliances and technology transfer arrangements with foreign partners.

- For example, Daewoo Heavy Industries has signed an MOU with Aviation Industries of China ostensibly to manufacture a 100-seat regional transport aircraft. The joint company that they propose to create, Asian Airbus, is also intended to include the participation of Singapore Aerospace and Hindustan Aeronautics.
- Hyundai Precision has recently entered an agreement with Yakovlev of Russia to establish a joint venture company in which Hyundai will hold a 51 percent equity stake. Hyundai says that the joint venture company will develop and assemble the 150-seat YAK42H and 30-seat YAK40H in Korea and sell them in foreign markets. Yakovlev will undertake the design and development of the aircraft while Hyundai will provide capital investment, set up a sales network and construct and operate an assembly plant in Korea.
- For its part, Daewoo Heavy Industries has purchased a whole team of approximately 100 aeronautical engineers from Russia's Mikoyan Design Bureau to work on the development of a medium-sized commercial transport aircraft. Daewoo decided that this was the most cost effective approach to achieving a rapid upgrading of its own design team, which is also being augmented by extensive hiring here at home.
- The Korean and Russian Governments are also working to promote closer cooperation in the aerospace industry, with the intention of furthering the commercialization of Russian aerospace technology especially in third country markets. To this end, a Korean mission has been assigned to Moscow to work on the establishment of an on-line system for technology sharing between the Korea Academy of Industrial Technology and its Russian counterpart.
- As well, Korea is intent on establishing industrial cooperation in aerospace with Israel. In September 1993, the Korean Science and Technology Minister became the first Government minister to visit Israel since the two countries established full diplomatic relations in 1962. During the Ministerial visit, the Korea Aerospace Research Institute and Israel Aircraft Industries concluded a Memorandum on Cooperation in Aerospace Technology Development, which is intended to provide the basis for cooperation in a broad range of aerospace R&D.

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Company **KOREAN AEROSPACE INDUSTRY PRODUCTS**

Company	Category	Main Products
Korean Airlines Co., Ltd.	Final Assy.	UH-60P Black Hawk helicopters 500MD helicopters F-5 E/F tactical fighter 520MK attack helicopters Blue-Sky '91 light aircraft
	Airframe	KTX-1 (center/rear fuselage) F-16 (wing/rear fuselage) B747 (flap track fairing/wing tip extension) B777 (flap support fairing/wing tip assy.)
Korea Lost Wax Ind. Co., Ltd.	Mechanical Comp.	MD-11 (wing-to-fuselage fillets/spoilers) MD-80 (elevator nose cap/sheet metal assy.)
Korea Machinery Co., Ltd.	Airframe	A330/340 (fuselage upper section shell)
Korea Heavy Ind. & Construc. Co., Ltd.	Engine	T700 (for UH-60) Engine components (PW4000/PW4168)
Hankuk Fiber Glass Co., Ltd.	Space	Spacecraft Bus Structure assy. for KOREASAT
Samsung Aerospace Industries, Ltd.	Final Assy.	F-16 C/D fighter
	Airframe	Forward fuselage (F-16/KTX-1) Airframe components (B747/B757/B767/CH-47D/DASH-8)
	Engine	F100 (for F-16) Engine components (PW4000/CT-7/J79/J85/A250/LM2500/CF-6)
	Avionics	SMS (for F-16)
Daewoo Heavy Industries Ltd.	Final Assy.	KTX-1 primary trainer RPV (unmanned helicopter)
	Airframe	Center fuselage (F-16) Airframe components (B747/A320/DO-328)
	Mechanical Comp.	Carbon-carbon brake disk
Hyundai Precision & Industries Co., Ltd.	Final Assy.	BK-117 helicopters
	Mechanical Comp.	AME (alternate mission equip. for F-16)
Halla Engineering & Heavy Ind. Ltd.	Space	Payload attach Fitting of Launch vehicle for KOREASAT

Company	Category	Main Products
Goldstar Precision Co., Ltd.	Avionics	Head-up-display units/VHF-radio Radar/cockpit recoder/altimeter
Daeshin Metal Mfg. Co., Ltd.	Airframe	Airframe components (B747/CH-47/MK-67/MD-80/F-100)
Samsung Electronics	Avionics	Tactical air navigation/system Payload for satellite
Korea Lost Wax Ind. Co., Ltd.	Engine	Turbine air seal Turbine wheel
Korea Machinery Co., Ltd.	Mechanical Comp.	Actuator (F-16/UH-60) Flight control system/hydraulic system)
Korea Heavy Ind. & Construc. Co., Ltd.	Airframe	Airframe components and materials Gas turbine engine
Hankuk Fiber Glass Co., Ltd.	Airframe	Airframe components (B747/UH-60/PW400) Helicopter rotor blade
Hankuk Mold Co., Ltd.	Airframe	Mold & parts
Oriental Industry Co., Ltd.	Airframe	Airframe Components (B777/UH-60/500MD)
Duksan Air Ind. Co., Ltd.	Airframe	Airframe components (B747/B757/A320/DO-328/DASH-8)
Chunji Industrial Co., Ltd.	Airframe	Airframe components (F-16/A320) Bell helicopter (tail rotor gear box)
Hwanwoong Precision Co., Ltd.	Airframe	P-3C (workstand platform)
Dongyang Nozzle Co., Ltd.	Airframe Assy.	Ultra-light Sports Plane F-16 (ejector/pylon)
Korea Bell Helicopter Co., Ltd.	Airframe Maintenance	Helicopter maintenance (UH-1H/OH-58/Bell-412/-206L/AH-1S/UH-1H)
Goldstar Information & Communications Ltd.	Avionics	Payload elements & Ground sytem hardware for KOREASAT
Daeyoung Electronics Ind. Co., Ltd.	Avionics	F-16 cable harness/RWR/INS (AN/ARN-101) Helicopter (ARC-186 radio/APR-39 radar)
Litton Korea Ltd.	Avionics	Avionics (INS/RWR/electronics warfare)

Company	Category	Main Products
Sammi Metal Product Co., Ltd.	Material	Stainless & nickel alloy forging
Samsun Industrial Co., Ltd.	Material	Aluminum material
Kumho & Group Co., Inc.	Mechanical Comp.	Aircraft tire
Tongmyung Heavy Ind. Co., Ltd.	Mechanical Comp.	Pump (for UH-60/valve/hydraulic equipment)
Dongseo Aircraft Component Co., Ltd.	Mechanical Comp.	Pylon (for UH-60) Tooling (F-16/DO-328/B777)
Daewoo Telecom Ltd.	Space	Satellite & ground stations
Hyundai Motor Company	Engine	Gas turbine engine
Mando Machinery Co.	Mechanical Comp.	Generator (for UH-60)
Asiana Airlines	Airframe Maintenance	Airplane maintenance
Iljin Co., Ltd.	Avionics	Cable & wire for aircraft circuit
Cheil Industries Inc.	Material	Compound material
Hanil Forging Co., Ltd.	Engine	PW4000 blade
Wooshin Engineering Co., Ltd.	Airframe	Airframe components
Doowon Heavy Ind. Co., Ltd.	Mechanical Comp.	Actuator (C-130/UH-60) 500MD (Armor plate)
Seoul Engineering Co., Ltd.	Mechanical Comp.	Bell helicopter (oil filter)/missile (frame)
	Material	Al/Mg castings

PRINCIPAL KOREAN MANUFACTURERS OF DEFENCE-RELATED PRODUCTS

Aerospace

Chun Ji Industrial Co., Ltd.
371-50 Garibong-dong, Guro-ku, Seoul
Tel: 822-853-3021/4
Fax: 822-864-0815

The metal and machine division, being one of six divisions of Chun Ji Ind. Co., Ltd., was founded in 1975 and located at Seoul. Chun Ji is one of the leading investment casting firms in Korea. With over 15 years of experience in the production and supply of investment castings for military use and machinery industries, Chun Ji plans a gradual accumulation of technology and intensive development efforts to broaden its production capabilities. Chun Ji has established a reputation in the industry for supplying precision parts for aircraft and engines.

Daewoo Heavy Industries Ltd.
541, 5 Ka, Namdaemun-ro, Chung-ku, Seoul
Tel: 822-752-0211
Fax: 822-756-2679

As Korea's largest integrated manufacturer of machinery, DHI has 5 major production complexes including those in Incheon, Anyang, the Youngdungpo section of Seoul, and Changwon. Currently, DHI is engaged in production in 11 major areas: diesel engines, construction equipment, industrial vehicles, aerospace industry products, rolling stock, machine tools, factory automation products, industrial facilities, new materials, defence industry products and precision machines.

The Aerospace Division of Daewoo Heavy Industries produces F-16 airframe components, Boeing 747 components and various other aircraft and engine components, including components for the de Havilland DASH-8. DHI Aerospace is a risk sharing partner for the Dornier 328 short range commuter aircraft. DHI Aerospace has also completed an ambitious program to build the entire wing for the British Aerospace Hawk trainer.

Goldstar Precision Co., Ltd.
20, Yoido-dong, Youngdungpo-ku, Seoul
Tel: 822-787-6802
Fax: 822-784-1646

Goldstar Precision was established in 1976 as Korea's first consolidated depot to perform overhaul and maintenance work on missile systems for the ROK armed forces. Since then, the company has diversified its business to design and produce applied defence products such as missile systems, radar systems, fire control systems, avionics, electro-optics, underwater systems, and to provide total technical services to maintain these products for its

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customers. The company operates its own research and development laboratory in Anyang and puts more than 7% of its total annual sales revenue into research and development projects. The majority of military equipment is produced to rigid MIL-SPEC quality control standards.

Korean Air Co., Ltd.

Marine Center Bldg., C.P.O. Box 864
118, 2 Ka, Namdaemun-ro, Joong-ku, Seoul
Tel: 822-771-66
Fax: 822-756-7929

Korean Air's aerospace division was established in 1976 as a subsidiary, specializing in aircraft manufacturing and maintenance, with the objective of leading the aerospace industry in this country. The aerospace division has a site of 7 million square feet and total floor space of 2 million square feet for aircraft manufacturing and maintenance.

Its main areas of business consist of the production, maintenance, repair and modification of aircraft and related components, and research and development.

Manufacturing:

- Assembly and parts manufacturing of 500 series helicopters (500 M/D, 500 E/F, 520N, M/R blade)
- Assembly and parts manufacturing for fighter aircraft (F-5 E/F)
- Boeing 747 flap track fairing/B747-400 wing tip extension
- Douglas MD-11 wing to fuselage fillet and spoiler/MD-80 sheet metal assembly
- Airbus A330/340 forward upper fuselage shell
- Engine parts (MD-11/PW 4000 mid-fan cowl)

Maintenance: Korean Air has broad repair and overhaul capabilities for military aircraft, with an Asia-wide mandate from the U.S. Air Force for some types of maintenance. Programmed depot level maintenance, corrosion control, modification, repair and overhaul operations have been carried out for the following aircraft:

Fighter: F-4, F-15, F-16, A-10
Transport: C-130, C-123
Helicopter: 500MD, UH-60, CH-53, CH-47, UH-1, ALT-III, OH-58

On the civilian side, Korean Air is capable of doing 85% of its own avionics maintenance, 80% of its own electronics maintenance, 90% of its own instrumentation maintenance, 80% of its hydraulics maintenance and 80% of its accessory maintenance requirements. Line maintenance and powerplant heavy maintenance requirements. Airport, while heavy maintenance takes place at Kimhae, where the aerospace manufacturing and military maintenance facilities are also located.

Research & Development:

- Ultra-Light aircraft (Chang Gong series)
- F-4 & F-5 Upgrade
- Aircraft parts development (MD-11 Spoiler design)

Samsung Aerospace Industries Co.
 24th Fl., Samsung Life Bldg.
 150, 2 Ka, Taepyung-ro, Chung-ku, Seoul
 Tel: 822-751-8114
 Fax: 822-751-8570/8861

Samsung Aerospace (SSA) is arguably Korea's leading aircraft manufacturer. Since its establishment in 1977, the company has played a pioneer role in many high precision programs, developing the technology necessary to produce rocket, missile and laser devices, cameras and factory automation systems.

In 1980, SSA launched a program to manufacture jet engines locally, making it possible for Korea to build fighter aircraft under licence. From that time, Samsung has been supplying a steadily growing number of customers with airframe, fuselage, and aircraft engine parts. SSA has been able to enhance its core technologies by participating in joint projects with leading foreign aircraft companies to develop new types of jet engines. As a result of its involvement in numerous military aerospace projects, Samsung Aerospace has broad experience as a system integrator.

A key milestone in SSA's progress toward becoming an integrated aircraft manufacturer was the selection of SSA as the prime contractor for the production of Korea's next generation fighter, the F-16. In addition to this sophisticated aircraft program, the company has made substantial gains as a manufacturer of parts for large passenger aircraft and helicopters.

To broaden the development of its aerospace capability, Samsung Aerospace is seeking risk sharing opportunities with the world's leading aerospace companies. Samsung is currently a risk sharing partner on the PW4000 engine.

Aero-Engines:

Repair and Overhaul: F100, J79, J85, T53, A250, T56

Production: F100, J85-21, A250, LM2500

Fabrication: many, risk sharing partner on the PW4000

Design: Samsung is interested in developing its own engine design capability. Deterred by the prices quoted by existing engine manufacturers for the comprehensive technology transfer programs necessary, Samsung Aerospace has hired 25 engine designers from SDC

Turbine of the former Soviet Union to join the ongoing work on a super lightweight gas turbine engine.

Halla Group (Mando Machinery Corporation)

Aerospace Center

Halla Business Group

Halla Building

891-44, Daechi-dong

Kangnam-ku, Seoul

Tel: 822-559-1114

Fax: 822-559-1799

Samsung Aerospace Industries Co.
24th Fl., Samsung Life Bldg.
150, 2 Ka, Teapung-ro, Chung-ku, Seoul
Tel: 822-751-8114
Fax: 822-751-8570

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The Halla Group has recently entered the aerospace equipment manufacturing business, through the creation of licensing agreements between its subsidiary, the Mando Machinery Corporation, and foreign manufacturers. The Halla Group is concentrating on the manufacture of mechanical and electro-mechanical components and systems.

In particular, Mando Machinery entered a technical cooperation agreement in May 1994 with the Sundstrand Corporation for the manufacture of electrical components for the F-16 fighter including main generators, constant speed drives, generator control units and current transformers.

Naval Vessels

Daewoo Shipbuilding and Heavy Machinery Ltd.
541, Namdaemun-Ro 5-Ga, Joong-Ku, Seoul
Tel: 822-779-0761
Fax: 822-756-4390

DSHM has established a Special Ship Division, which is devoted to the design and construction of naval ships and other special purpose vessels. The deliveries by this Division to date include frigates, corvettes, offshore patrol vessels, fast patrol vessels and multi-purpose rescue ships. Arguably Korea's leading naval shipyard, DSHM has been designated as the lead company in the design and construction of Korea's KDX destroyer, as well as for other projects of the ROK Navy and the Maritime Police.

Hanjin Heavy Industries Co. Ltd.
Suite 907, Marine Center Bldg. 1888
Namdæmun-ro, 2-Ka, Joong-Ku, Seoul
Tel: 822-728-5439
Fax: 822-756-5455

This company was founded in 1937 as Korea Shipbuilding and Engineering Corp. in the southern port of Pusan. It was acquired in 1989 by the Hanjin Group, which also owns Korean Air. The company's special projects division has carried out the design and construction of a broad range of naval and special vessels. Since 1967, it has constructed more than 100 naval vessels including fast attack craft, corvettes and frigates.

Hyundai Heavy Industries Co. Ltd.
11th Fl., Hyundai Building
140-2 Kye-Dong, Chongro-ku, Seoul
Tel: 822-741-1142
Fax: 822-741-1152

The Special and Naval Shipbuilding Division was established in 1975 to design and construct a diverse range of innovative civilian vessels and numerous types of naval ships. HHI has built a large number of 2000-ton frigates of its own design as well as 800-ton

and 1200-ton corvettes and fast patrol boats. HHI is the lead company for the design and construction of a new generation of fast mine laying vessels for the ROK Navy.

The Special and Naval Shipbuilding Division operates to research institutes at the company's Ulsan shipyard: the Hyundai Maritime Research Institute and the Hyundai Welding and Materials Research Institute. Both institutes are engaged in the advancement of naval shipbuilding technology.

Kangnam Corporation

Kangnam Building, 6th Floor,
1355-21, Seocho-2-Dong, Seocho-Gu, Seoul
Tel: 822-557-7053
Fax: 822-563-9573

The Kangnam Corporation, which was established in 1969, is Korea's leading manufacturer of GRP vessels. Kangnam's GRP shipbuilding facilities are capable of building vessels up to 500 tons of displacement. The company's military products include a mine counter measure vessel (the Korea Mine Hunting Craft or "KMHC") and a high speed patrol boat.

Communications and Electronics

Daewoo Telecom Company Ltd.

541, 5-Ga, Namdaemun-Ro, Joong-Ku, Seoul
Tel: 822-771-35
Fax: 822-756-1225

Daewoo Telecom Company, one of the principal subsidiaries of the Daewoo Group, is a major supplier to the Korean military of products such as radars, sonars, C3I and field communication equipment. Most notably, the company has been designated as the prime contractor for the supply of all towed array sonars for ROK Navy vessels, both new construction and retro-fits. As such it will be supplying a very large number of towed arrays, which will of necessity incorporate technology and key components from abroad.

Daeyoung Electronics Industrial Co. Ltd.

Kukje Center Building, 16th Fl.
191, 2-Ka, Hangang-Ro, Yongsan-Ku, Seoul 140-012
Tel: 822-798-8331
Fax: 822-798-8337

Established in 1968, Daeyoung Electronics has developed into one of Korea's leading firms in the design and manufacture of radio and telecommunications equipment for military and civilian applications. It manufactures microwave and lightwave transmission systems as well as integrated services digital networks. The company's tactical equipment products include data terminals, colour graphic systems, tactical radios, avionics equipment, fire control systems and integrated shipboard communication systems.

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Goldstar Electric Co. Ltd.

Lucky Goldstar Twin Tower 20, Yoido-Dong
 Youngdungpo-gu, Seoul 150-721, West Tower, 22nd Fl.
 Tel: 822-780-9367
 Fax: 822-784-3549

GSE, which was founded in 1970, manufactures specialized military telecommunications equipment as well as electronic components such as printed circuit boards, hybrid ICs and electronic ceramics. GSE invests more than 10% of its annual turnover in R&D. Its military products include:

- KAN/TRC-145 (VHF ground tactical radio terminal set)
- KAN/TRC-113 (VHF/UHF ground tactical radio relay set)
- DELTA-MUX (cable communication system)
- SB-3090 (tactical switchboard)
- PRC-85K (VHF-FM hand-held tactical radio set)
- PYK-80 (field artillery computer)
- PRC-999K (VHF frequency hopping radio system)
- ULQ-11, 12(V) 1K (shipboard electronic warfare system)
- KALQ-88 (airborne electronic warfare system)
- NMD-9, GDS-17 (portable mine detector)
- other electronic warfare equipment

Oriental Precision Company Ltd.

164-1 Sangdaewon-dong, Sungnam-Si
 Kyung Ki-Do, Korea
 Tel: 822-233-5031
 Fax: 822-234-9590

OPC was established in 1953 and obtained designation from the Ministry of National Defense as a defence products supplier in 1973. The company produces a range of military radio sets and is engaged in the development of new radio and telecommunications systems for the military. Its military product range includes the following systems: AN/PRC-77, AN/GRC-160, AN/GRC-142AK, KAN/PRC-999K, SB-3090, AN/VRC-12 series, AN/GRR-5K, AN/GRA-39B, AN/SSQ-41B, PRC-85K.

Samsung Electronics Co.

7th Fl., Plaza Jang Woo Building
 628-14, Youksam-Dong, Kangnam-Ku, Seoul
 Tel: 822-559-3114
 Fax: 822-559-3313

The current military product range of Samsung Electronics is focused on the following three areas:

Radar:

- tracking radar for naval vessels
- surveillance radar for naval vessels
- tracking and surveillance radar for air defence
- power modules for long range radar

Electro-Optical and Fire Control Systems:

- fire control system for the K-1 tank
- fire control systems for naval vessels
- laser range finders
- thermal night vision devices

Electro-Communication:

- terminal systems
- communication and security equipment
- tactical fax

During the present decade, the company plans to expand its capabilities to include the following technologies:

Radar:

- medium and high altitude radar for air defence
- airborne radar
- satellite tracking radar

Missiles:

- anti-tank missiles
- air-to-air missiles

Electro-Optical and Fire Control Systems:

- next generation fire control system for naval vessels
- next generation fire control system for tanks
- laser systems
- third generation night vision devices
- missile tracking and control systems
- industrial electronic control systems
- laser appliance indicator and control systems

Electro-Communication:

- tactical communication systems
- tactical switchboards
- tactical fibre optic cables
- VHF and EW equipment
- satellite communication and information systems

Military Vehicles and Arms

Daewoo Heavy Industries Ltd.
 Daewoo Center Bldg., 20th Fl.,
 541, 5-Ka Namdaemun-Ro, Joong-Ku, Seoul
 Tel: 822-752-0211
 Fax: 822-756-2679

DHI can trace its roots back to the founding in 1937 of the Chosun Machine Works, which were acquired by the Daewoo Group in 1976. As Korea's largest integrated manufacturer of machinery, DHI has major production complexes located in Incheon, Anyang, Seoul and Changwon. The company is active in the following fields: diesel engines, construction equipment, industrial vehicles, aerospace industry products, rolling stock, machine tools, factory automation

products, industrial facilities, new materials, defence products and precision machines. Its military products include: a range of armoured vehicles, the Vulcan, the MLRS, 60 and 80mm mortars, aircraft fuselages and related components and components for the U.S. Army M113 APC.

Hyundai Precision and Industries Co. Ltd.

140-2, Gye-Dong, Chongro-Ku, Seoul

Tel: 822-746-4010

Fax: 822-741-2248

HDPIC is the manufacturer of the K-1 main battle tank. The company has also accumulated extensive experience through the upgrading retro-fit, modernization, overhaul and repair of combat tanks including the M47, M48, M60 and other tracked vehicles. HDPIC also manufactures the BK-117 helicopter under licence.

Samsung Shipbuilding and Heavy Industries Co. Ltd.

Daekyung Building, 120-2 Ka, Taepyong-Ro, Joong-Ku, Seoul

Tel: 822-752-1584

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The special projects division of SHI has concentrated on two major projects: the M109A2 155mm self-propelled howitzer under a co-production program with the U.S. prime contractor; and the KH-179 155mm towed-Howitzer. The company is interested in taking on other munitions programs.

- o Dispute arbitration between Canadian and Korean business.
- o Intervention to resolve bureaucratic problems.
- o Trade seminars.
- o Market intelligence and market information.

Canadian companies are encouraged to make full use of Embassy services when they develop their export plans for the Korean market.

CONTACT	RESPONSIBILITIES
Michael Woods Counsellor (Commercial)	Defence and aerospace products marketing, and defence industrial cooperation
Roger Acreman, Colonel Canadian Forces Attaché	Defence relations

SERVICES OF THE

CANADIAN EMBASSY - SEOUL, KOREA

Canadian missions around the world operate as advisors for Canadian business. A non-exhaustive list of the services offered is set out below.

- o Local market assessment for products and services.
- o Search for potential local agents, distributors or other potential local partners.
- o Assessment of local contacts: capability; history; obtaining credit reports etc.
- o Discount hotel reservations, in many cases up to 50%.
- o Full schedule of meeting arrangements for initial market visits.
- o Detailed market studies on a wide variety of products and services.
- o Dispute arbitration between Canadian and Korean business.
- o Intervention to resolve bureaucratic problems.
- o Trade seminars.
- o Market intelligence and market information.

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