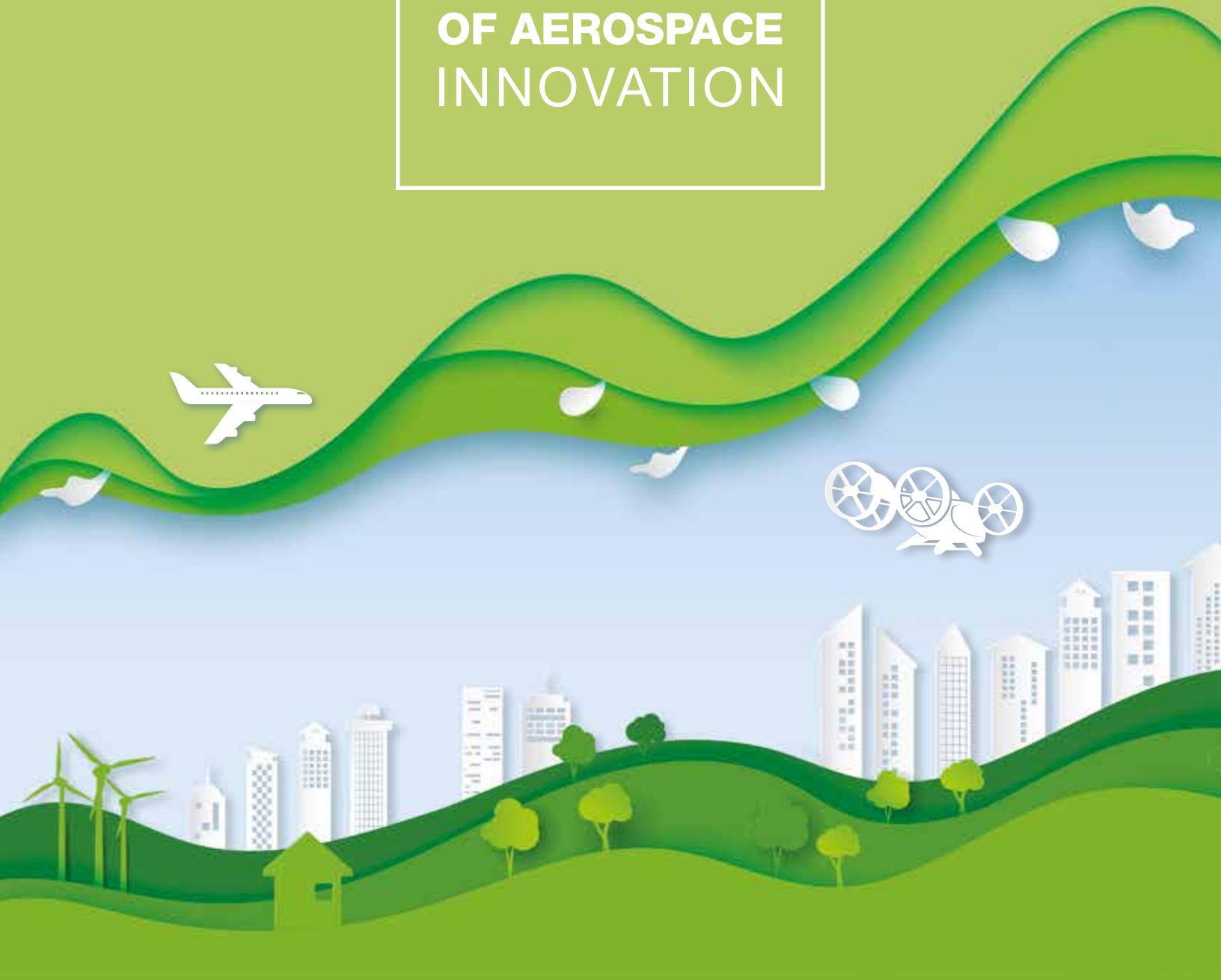


ACTIVITY REPORT 2019



SUSTAINABLE MOBILITY
AT THE HEART
OF AEROSPACE
INNOVATION



QUÉBEC, A GLOBAL AEROSPACE HUB

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1st rank
Québec exports

More than
70%
of Canadian R&D
in aerospace is conducted
in the Greater Montréal region

240 Companies

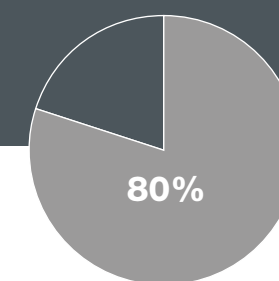
- 6 OEMs
- 15 Tier 1 partners, equipment manufacturers, and maintenance, repair and overhaul (MRO) companies
- 219 Specialized suppliers

\$17.8B

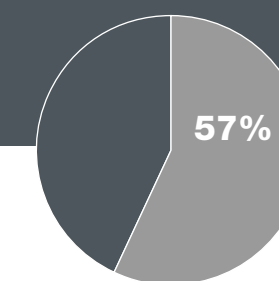
In revenues
(+15.9% compared with 2018)

43 400

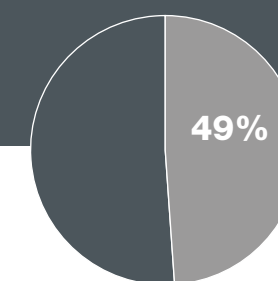
Highly-skilled workers
(+3.1% compared with 2018)



of Québec aerospace
production **exported**



of Canadian aerospace
sector's **sales**



of Canadian aerospace
sector's **jobs**



Denis Giangi,
Chair, Aéro Montréal
President of Rolls-Royce Canada

**THE WORLD
AND TIMES ARE
CHANGING.
SO IS AÉRO MONTRÉAL.**

As the essential voice of Québec's aerospace industry on the national and international stages, Aéro Montréal further strengthened its role as a strategic leader in 2019.

Given the challenges posed by the prospects for growth in global air traffic, increasing environmental considerations, and the need to support the digital transition and train a specialized workforce, Aéro Montréal further equipped itself to support companies in the industry.

BUILDING A STRONG ECOSYSTEM

2019 was a year marked by significant investments designed to strengthen our cluster. While Airbus confirmed and increased its presence in Québec, Mitsubishi Aircraft Corporation also announced its arrival. International collaborations were firmed up and interactions among companies better structured.

Amidst all this activity, Aéro Montréal supported innovation in all its forms.

Through collaboration agreements, it reaffirmed its commitment to closing gaps in Québec's integration capabilities and to support the strengthening of a competitive, world-class supply chain.

It worked to overcome the labour scarcity affecting the sector by raising, through extensive visibility campaigns, awareness of training and job opportunities among the next generation of workers. It made sure that the industry is well represented in the media. And by producing a white paper, it sought solutions for fostering equity, diversity and inclusion in aerospace.

The cluster also acted boldly by encouraging companies to take stock of environmental concerns affecting the industry. Through its involvement in programs designed to develop cleaner and quieter aircraft, such as the SA²GE - Greener Aircraft Mobilization Project, Aéro Montréal is demonstrating its constant commitment to promoting the emergence of green initiatives that generate major economic benefits.

BECOMING THE MOST INNOVATIVE CLUSTER IN THE WORLD

By adapting the way it operates, Aéro Montréal is making sure that it has the right structure in place to help the industry meet the challenges ahead.

The Board of Directors welcomed two new members from sectors related to our industry, and created four strategic pillars. As new working groups launched their projects, others modified their missions to better reflect the sector's challenges. Members of the working groups have also identified potential areas of collaboration for the communities of practice that will be deployed in 2020.

With the support of McKinsey & Company, Aéro Montréal also developed a new three-year strategic plan for 2019-2021 that addresses societal and environmental challenges.

This work reaffirms that, for both clusters and companies, the key to success lies in opening up to related sectors and encouraging greater knowledge sharing among companies. By becoming more accessible and promoting interaction among members, Aéro Montréal will be in a better position to foster productivity and innovation.

I believe that all these changes will enable the cluster to anticipate major industry challenges and facilitate the implementation of the solutions needed to ensure the competitiveness of aerospace companies, both in Québec and internationally.

STRENGTHENING A NETWORK OF ENGAGED PLAYERS

Aéro Montréal would not be the strategic think tank it is today without the vision and unwavering commitment of its key players. In fact, mobilization levels have reached a new high, with 325 people participating in our various entities.

The involvement of the Board of Directors and members of the working groups is contributing to the creation of innovative projects and moving our industry forward.

We also are fortunate to be able to count on Suzanne M. Benoit, our President, and a team that is firmly dedicated to excellence. They are ensuring the effective implementation of the cluster's strategies and the achievement of results that benefit all our members.

I would like to commend all these players for their commitment. They are having a tremendous leverage effect on our industry and are helping to create fertile ground for investments and innovations. They will without a doubt facilitate the creation of a greener, more efficient, and stronger aerospace industry.

THANKS TO SYLVAIN BÉDARD

Sylvain Bédard, Chair of the Board of Aéro Montréal and Chief Executive Officer of Sonaca Montréal, stepped down from his position in 2019 to begin a well-deserved retirement.

A founding member of Aéro Montréal, he chaired our organization's Board at a pivotal time. He contributed to the establishment of an exemplary governance policy and the development of the 2019-2021 strategic plan, which is well on track.

On behalf of all Aéro Montréal collaborators, I would like to applaud his dedication and warmly thank him.



Suzanne M. Benoît,
President
Aéro Montréal

**DARING, INNOVATION
AND CONSOLIDATION
OF AN INDUSTRY
COMMITTED
TO SUSTAINABLE
DEVELOPMENT**

The aerospace industry – a major pillar of the Québec economy – knows how to deal with market turbulence. It has demonstrated this on many occasions in recent years. Its great resilience and ability to perform in sometimes difficult contexts have enabled it to continue growing. While industry players are mobilizing to meet the challenges posed by the COVID-19 pandemic, 2019 will be recalled as a year of many records!

Sales of Québec’s aerospace industry totalled \$17.8 billion, representing an exceptional growth of 15.9%. This significant increase in sales compares favourably with the results observed in France (+9%), the United Kingdom (+6.6%), and the United States (+5%). This remarkable performance confirms our position as a leading Québec exporter, with sales representing 57% of the Canadian aerospace sector’s total sales.

Thanks to its unique and diversified ecosystem, Québec has succeeded in confirming its leadership position in the global aerospace supply chain. At a time when companies are pursuing their digital transformation at an accelerated pace, other challenges, such as those related to sustainable mobility, are making themselves felt. Our sector will emerge stronger because of its outstanding ability to adapt and renew itself.

CONSOLIDATING THE ECOSYSTEM

Our cluster has strengthened considerably over the past year. Airbus has reiterated its commitment to the A220 and its plans to create new jobs by accelerating its production rate. We were also pleased to welcome Mitsubishi Aircraft Corporation and its engineering centre in Boisbriand. With six major prime contractors, supported by some 15 equipment manufacturers and close to 200 suppliers, Québec is reaffirming its leadership position in the global aerospace market.

GOING GREEN

Our industry currently accounts for 2% of global greenhouse gas emissions. Given that air traffic is growing at a rate of 5% per year, the impact on the environment will only increase if nothing is done to build greener and more efficient aircraft.

In light of this, our Québec network has structured itself and already made considerable efforts to reduce the ecological footprint of air transportation and, above all, to pave the way for tomorrow’s sustainable mobility. New, lighter composites are already available and the technologies offered by 3D printing are evolving at an accelerated pace. Some players are exploring new frontiers with the advent of autonomous vehicles.

Our engine manufacturers are working tirelessly to improve engine performance and come up with new electric or hybrid propulsion systems that could deliver up to 30% fuel savings. Sustainable alternative fuels are also an interesting solution that could reduce CO₂ emissions by 60% to 80%. Québec is also ready to establish a biofuel industry.

For its part, Aéro Montréal took advantage of the year 2019 to integrate an environmental component into each of its projects and to place innovation at the forefront of its major events. By strengthening its participation in initiatives such as the SA²GE project, the cluster has clearly demonstrated its desire to position environmental issues at the heart of the ecosystem’s development.

ENSURING THE ATTRACTIVENESS OF THE SECTOR

This green shift is also a great opportunity to encourage the next generation of workers to join our industry. They prefer employers who share their values and who are committed to investing in the development of leading-edge technologies in sustainable mobility.

Through the Regroupement Relève Aéro Montréal (RRAM) and promotional campaigns such as “Rise to the Future,” we have initiated a major awareness-raising campaign that we intend to continue by adding a sustainable component. Let’s share our passion, support our proud ambassadors, and multiply our efforts to promote our achievements in sustainable development as well as the diversity of training programs and employment opportunities in aerospace.

BUILDING THE INDUSTRY OF THE FUTURE

2019 was an exceptional year. I would like to thank the entire Aéro Montréal team, which stood out through its commitment and tremendous agility. I would also like to thank the members of Aéro Montréal’s Board of Directors for their support and valuable contributions.

Our sector is booming and provides fertile ground for a successful shift towards sustainable mobility. I am convinced that, together, we will successfully carry out this major transformation that will help position Québec’s aerospace industry at the heart of the economy of the future in an increasingly eco-globalized environment.

BOARD OF DIRECTORS

CHAIR
Denis Giangi
 President
Rolls-Royce Canada
 (1) (2) (3) (4)

Claude Baril
 President
Stelia, North America
 (1) (4)

Paul Costanzo
 Chief Executive Officer
Sonaca Montréal
 (2)

Michel Grenier
 Vice President and
 General Manager
*Thales Canada,
 Avionics*
 (4)

Alain Ouellette
 Executive Director,
 R&D Centre,
 Automation
 and Manufacturing,
 HP Compressor
GE Aviation

Philippe A. Tanguy
 General Manager
Polytechnique Montréal

VICE-CHAIR
Patrick Champagne
 Vice President,
 Corporate Strategy and
 Government Relations
CMC Electronics
 (1) (3)

Sylvain Boisvert
 General Manager,
 Canada
*Safran Engineering
 Services*

Maria Della Posta
 President
Pratt & Whitney Canada

Gilles Labbé
 Executive Chairman
 of the Board
Héroux-Devtek

Ugo Paniconi
 Vice President and
 General Manager
L3Harris Technologies

Ibrahim Yimer
 Director General,
 Aerospace
 Research Centre
*National Research
 Council Canada (NRC)*

TREASURER
Jean Blondin
 President
Abipa Canada
 (1) (2)

Joanna Boshouwers
 Chief Operating Officer
MDA
 (2)

Pascal Désilets
 Director
*École nationale
 d'aérotechnique
 (ÉNA)*

Steeve Lavoie
 President
Bell Textron Canada
 (3)

Nathalie Paré
 Executive Director
*Comité sectoriel
 de main-d'œuvre
 en aérospatiale
 (CAMAQ)*

**CORPORATE
 SECRETARY**
Suzanne M. Benoît
 President
Aéro Montréal
 (1) (2) (3) (4)

Louis Brunet
 Director,
 Business
 Development
Collins Aerospace

Éric Dionne
 Director
*École des métiers
 de l'aérospatiale
 de Montréal (ÉMAM)*

Olivier Marcil
 Vice President,
 External Affairs
Bombardier

Louis Marc Pinard
 General Manager
Arconic

Mario Bouchard
 Assistant Deputy
 Minister, Strategic
 Industries and Major
 Economic Projects
*Ministère de l'Économie
 et de l'Innovation (MEI)*

Alain Aubertin
 President and Chief
 Executive Officer
*Consortium
 for Research
 and Innovation
 in Aerospace
 in Québec (CRIAQ)*

Jacques Cabana
 President and Chief
 Executive Officer
FDC Aero Composites
 (4)

Jean-François Dupont
 Chief Executive Officer
AV&R

Hugue Meloche
 President and Chief
 Executive Officer
Groupe Meloche
 (1)

Yves Proteau
 Co-President
APN

Julie Insley
 Executive Director,
 Québec Region,
 Strategic Policy Sector
*Innovation,
 Science & Economic
 Development Canada
 (ISED)*

Philippe Balducchi
 Chief Executive Officer
Airbus Canada

David Chartrand
 Grand Lodge
 Representative
IAMAW

Hélène V. Gagnon
 Vice President,
 Public Affairs
 and Global
 Communications
CAE
 (3)

Joris Myny
 Senior Vice President,
 Digital Industries
Siemens Canada

Sylvain Savard
 President
Avianor

OBSERVERS

- 1 Executive Committee
- 2 Finance and Audit Committee
- 3 Human Resources Committee
- 4 Governance Committee

A NEW OPERATIONAL STRUCTURE

With Aéro Montréal’s strategic plan ending on December 31, 2018, the cluster secretariat and a Board of Directors committee worked on a renewal of the strategic plan for the period 2019-2021.

The recommendations adopted required a redefinition of roles and responsibilities as well as a modification of the organization’s operational structure. The charts illustrate these changes.

The flow of information among all Aéro Montréal bodies and the opening of our cluster to aerospace-related sectors are the keys to the success of this major organizational reform.

HIGHLIGHTS

- The Board has established four pillars around which Aéro Montréal’s activities are grouped: (1) Growth, (2) Innovation, Competitiveness and Productivity, (3) Workforce and (4) Image, Influence and Marketing.
- In order to ensure greater operational efficiency, five channels of engagement have been established: (1) Market/New Niche working groups, (2) Thematic working groups, (3) Programs and initiatives related to the themes of the working groups, (4) Working group committees and (5) Communities of practice.
- Each of the pillars oversees one or more working groups, programs, initiatives or committees.
- Each pillar is sponsored by a member of the Board of Directors. This person is responsible for ensuring that Aéro Montréal’s strategy is aligned with the orientations and the various channels of engagement. He/she ensures two-way communication between the Board and operations. This board member is supported by a pillar manager, an employee of Aéro Montréal’s secretariat.
- Regular meetings are held between the board members responsible for the pillars, the pillar managers, and the members of the working groups.
- The working groups have been modified to better reflect current and future industry challenges. Challenges related to sustainable mobility have also been incorporated. As a result, we have reviewed the mandates of all the working groups and created new ones.

CHANNELS OF ENGAGEMENT

PILLARS	GROWTH	INNOVATION, COMPETITIVENESS AND PRODUCTIVITY	WORKFORCE	IMAGE, INFLUENCE, AND MARKETING
	Growth of industrial companies	Innovation (products and processes) and competitiveness	Workforce attraction, mobilization and development (skills)	Promotion and industry outreach
MARKET/NEW NICHE WORKING GROUPS	<ul style="list-style-type: none"> • Defence and Security Working Group • MRO Working Group • RPAS Working Group 			
THEMATIC WORKING GROUPS	<ul style="list-style-type: none"> • Growth Working Group 	<ul style="list-style-type: none"> • Innovation Monitoring and Strategy Working Group • Green and Intelligent Supply Chain Working Group 	<ul style="list-style-type: none"> • Human Resources Working Group 	
PROGRAMS AND INITIATIVES RELATED TO WORKING GROUP THEMES	<ul style="list-style-type: none"> • SDQuébec Portal • Accelerator 360° Program • StartAéro 360° Program 	<ul style="list-style-type: none"> • MACH Initiative • MACH FAB 4.0 Initiative • Aéro 21 Committee* • SA²GE Committee* <p>* Separate entity with own organization</p>	<ul style="list-style-type: none"> • AeroPortal • Passion from Within • Passion for Flight • Accès Relève Aérospatiale 	<ul style="list-style-type: none"> • #AEROFUTURE (promotion campaign)
WORKING GROUP COMMITTEES	<ul style="list-style-type: none"> • Defence and Security Working Group committees: Strategies and measures, Future Fighter Capability (FFC), Future Aircrew Training (FAcT), and Innovation for Defence Excellence and Security (IDEaS) • MRO Working Group committees: Workforce, Competitiveness, and Regulation 	<ul style="list-style-type: none"> • SME and Innovation Committee • AI and Disruptive Tech Committee • REACH Committee • Innovation Zone Committee • Technology Monitoring Committee • Innovation Forum Committee 	<ul style="list-style-type: none"> • Heritage Committee • Internship Committee • 4.0 Skills Committee • Regroupement Relève Aéro Montréal • Concertation Table - Bombardier employees reclassification 	<ul style="list-style-type: none"> • Image, Influence, and Marketing Committee
COMMUNITIES OF PRACTICE	To be defined	To be defined	To be defined	To be defined

BOARD MEMBERS RESPONSIBLE FOR THE PILLARS



"Ultimately, all of Aéro Montréal's activities are aimed at growing our industry and our SMEs. Better coordination will avoid duplication and allow for optimal sharing of our expertise."

GROWTH PILLAR

Hugue Meloche
President and Chief Executive Officer
Groupe Meloche



"Innovation must be the driving force behind all our initiatives. It is the cluster's vision and the only way for the Québec industry to remain competitive."

INNOVATION, COMPETITIVENESS AND PRODUCTIVITY PILLAR

Patrick Champagne
Vice President, Corporate Strategy and Government Relations
CMC Electronics



"The challenges of ensuring the next generation of workers and training affect all sectors of our industry. A comprehensive vision is needed. This is what I will focus on."

WORKFORCE PILLAR

Jacques Cabana
President and Chief Executive Officer
FDC Aero Composites



"We are ensuring that our exciting industry shines here and around the world. We are fortunate to have a strong, innovative, dynamic and promising sector. We will make sure that the industry and Aéro Montréal speak with one voice to share our achievements and inspiring possibilities."

IMAGE, INFLUENCE AND MARKETING

Hélène V. Gagnon
Vice President, Public Affairs and Global Communications
CAE





**NEW INITIATIVES
AND INTERNATIONAL
OUTREACH**

The Growth Working Group was very active in 2019. In addition to pursuing several projects, such as SME mapping and offering a group insurance plan to SMEs, the working group held many training sessions. Each of these brought together some 15 participants and dealt with such subjects as intellectual property and OEM procurement strategies.

Many consultations also led to the development of recommendations to support the growth of SMEs, such as helping them increase their cash flow and obtain financial support to attract foreign labour.

In addition, a new working committee called “SME and Innovation” was launched in partnership with the Green and Intelligent Supply Chain Working Group.

WORKING GROUP OBJECTIVES

- Significantly increase the growth of Québec’s aerospace cluster in order to maintain its status as a global player in an increasingly competitive market.
- Reinforce synergies within the cluster and ensure its global growth.
- Strengthen the strategic positioning of Québec companies and their presence in the world.
- Promote the consolidation and growth of Québec companies.



Jean-Charles Raillat, Working Group President
President, Americas and Motorsport Division
Mecachrome Group

“In recent decades, the next generation has helped to integrate new techniques into companies, resulting in significant competitiveness gains and growth. The quality of the training offered by many institutions, particularly in artificial intelligence and Manufacturing 4.0, will enable us to have an efficient and skilled succession that will drive innovation in our companies and contribute to tremendous growth.”

**WORKING
GROUP
MEMBERS
2019**

Jean Blondin, President - *Abipa Canada*

Jacques Cabana, President and Chief Executive Officer - *FDC Aero Composites*

Susan Dabrowski, Strategy, Government Relations and Business Development
Libellule Monde

Christian Delisle, President - *Electro Kut*

Sébastien Farkas, Program Director
Groupe Meloche

Guillaume Gasparri, Executive Vice President, Business Development - *DCM Group*

Xavier Kauza, Sales Director - *Thermetco*

Joseph Laflamme, President - *Vestshell*

Hugue Meloche, President and Chief Executive Officer - *Groupe Meloche*

Patrick Phillips, Vice President, Business Development - *Tulmar*

Emmanuel Poleman, Business Development and Strategic Planning - *Pratt & Whitney Canada*

Jean-Charles Raillat, President, Americas and Motorsport Division - *Mecachrome Group*

Stéphane Roy, Strategic Product Owner
Presagis

Eduardo Ruiz, President - *Ruiz Aerospace*

Tommy Trudel, Business Development Director
Delastek

Stéphane Turcotte, President and Co-owner
Nétur

WORKING GROUP INITIATIVES

INITIATIVE	ACCELERATOR 360°
CATEGORY	Commercialization and consolidation
YEAR CREATED	2018
OBJECTIVE	Support the growth of Québec SMEs through internationalization and consolidation actions
PARTNER	Ministère de l'Économie et de l'Innovation
NUMBER OF PARTICIPANTS	Two cohorts with a total of 21 companies
FUNDING	Initiative of \$7.2M over five years, including a \$5M public contribution

2019 Results

- Monthly meetings of the Accelerator 360° and training of participants.
- Achievement of first consolidation.

INITIATIVE	STARTAERO 360°
CATEGORY	Commercialization of innovation
YEAR CREATED	2019
OBJECTIVE	Foster the integration and commercialization of breakthrough technologies in the aerospace supply chain through the production of industrial proofs of concept
PARTNER	Canada Economic Development for Québec regions
NUMBER OF PARTICIPANTS	17 companies recruited (Initiative in startup mode)
FUNDING	Initiative of \$4.4M over three years, including a \$3M public contribution

2019 Results

- Five training sessions.
- Launch of the StartAero 360° portal providing active overview of business opportunities and the establishment of collaborative projects.

PARIS AIR SHOW-LE BOURGET

THE QUÉBEC INDUSTRY AND AÉRO MONTRÉAL: AN ACTIVE AND NOTED PRESENCE!

The International Paris Air Show (PAS) at Paris-Le Bourget airport is the world's largest air show. Its 53rd edition, held from June 17 to 23, welcomed more than 2,450 companies from 49 countries, and represented a huge platform for exchanges with more than \$140 billion worth of contracts signed in 2019. This year's show featured 316,000 visitors and 2,700 media representatives.

Once again this year, Canada and Québec made their presence felt at this crucial event. The Québec mission, of which Aéro Montréal was a partner, brought together close to 150 participants representing 59 companies and organizations. The strong synergy between the teams from Aéro Montréal and the Government of Québec made it possible to optimize the services offered to the delegation (visibility, representation, etc.) and to more effectively promote our expertise and know-how.

Aéro Montréal organized and participated in a large number of activities designed to underscore the capabilities of Québec SMEs. Often held in the presence of Canadian and Québec elected officials and dignitaries, these events provided opportunities for international networking, updating our expertise, and putting us in touch with potential international partners and customers.

Finally, the show also gave us the opportunity to meet with our counterparts from foreign clusters and associations, allowing us to develop bilateral relationships that benefit the members of our respective organizations.

The number of well-attended events hosted by Aéro Montréal, as well as the many activities organized by the world's major aerospace players that involved our companies, demonstrates the international recognition and outreach enjoyed by Québec's aerospace sector.

The PAS was the subject of numerous communications by Aéro Montréal and MEI in the media and on social networks.



Québec's delegation at the PAS



Minister Pierre Fitzgibbon (MEI) visits Espace Québec. The Canada Pavilion, in which Espace Québec was located, featured 460 Canadian participants from 145 companies.



Aéro Montréal offered workshops at the pavilion, including one entitled "From a family-owned SME to a consolidated group: opportunities for growth and the development of new markets." In the photo: Denis Blais, General Manager, TNM; Claude Delâge, Senior Investment Manager, Transatlantic Fund, Managed Cogestion Siparex/Desjardins Capital; Aline Doyen, President, SOMEPIC; and Charlotte Laramée, Director, Growth, Aéro Montréal (panel moderator).



Groupement des industries françaises aéronautiques et spatiales (GIFAS) and Aéro Montréal organized a bilateral seminar and a roundtable discussion on innovation to explore opportunities for collaboration between Canada and France. Suzanne M. Benoît spoke about the opportunities generated by the agreement signed in 2018 between Aéro Montréal and GIFAS. Canada's Minister of Transport, Marc Garneau, was in attendance.

AÉRO MONTRÉAL INTERNATIONAL NETWORKING DINNER

This international networking dinner has become a tradition. Its purpose is to promote business relations between the delegation's SMEs, foreign companies and all of Aéro Montréal's partner organizations. This year, it welcomed more than 120 guests. Attendees included Québec SMEs, numerous Canadian and foreign prime contractors and research centres, foreign industrial clusters, and government representatives. Many dignitaries were in attendance, including Pierre Fitzgibbon, Québec Minister of Economy and Innovation, and Manon Brassard, Deputy Minister and President of Canada Economic Development for Québec Regions (CED). Our major partner for the evening, Charles Gratton, Vice President, Commercial Services and Real Estate Development, Aéroports de Montréal, was also in attendance.

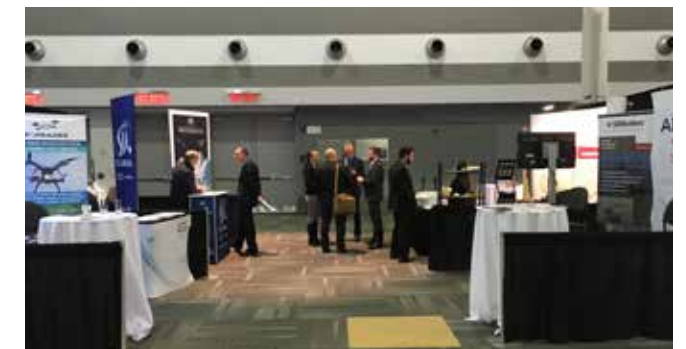
The dinner was organized by Aéro Montréal in collaboration with CED, in partnership with Aéroports de Montréal and the Fonds de Solidarité FTQ.



MANUFACTURED IN VERMONT

Once again this year, Aéro Montréal was present at this trade show featuring 120 exhibitors and more than 700 visitors. Twenty companies were part of the Québec delegation set up by Export Québec.

It was an opportunity for Aéro Montréal to renew its interest in the Québec-New England aerospace corridor by updating the framework agreement signed in 2013 with the Vermont Aerospace & Aviation Association, a division of the Vermont Chamber of Commerce. A new partner has been added, Aerospace Components Manufacturers, which covers Connecticut and southwestern Massachusetts.



SMES AT THE CANADIAN AEROSPACE SUMMIT IN OTTAWA IN NOVEMBER

Always eager to showcase the SMEs in its ecosystem, Aéro Montréal organized a mission by inviting five companies from the StartAéro 360⁰ Initiative to participate in the Summit in Ottawa.



**SDQUÉBEC
CONTINUE
TO EXPAND**

Canada's defence industry is a cornerstone of the country's security and economic growth. Its major contracts support innovation, maintain stimulating, high value-added jobs, and contribute to the prosperity of our industry.

Created in 2009, the Defence and Security Working Group has a general mandate to position Québec's aerospace industry in this important market.

WORKING GROUP OBJECTIVES

- Help Québec's aerospace industry compete better with Canadian and international players in the aerospace defence market.
- Identify, coordinate and monitor initiatives designed to structure projects in support of strategic recommendations.
- Establish key performance indicators (KPIs) to measure the implementation of the strategy.
- Represent the industry to governments on strategic issues concerning major equipment acquisition projects.



Sylvain Lefrançois, Working Group President
Business Development Consultant
Safran Electronics & Defense Canada

"The year 2019 has been a pivotal time to direct the working group's activities towards obtaining the greatest possible market share of major Government of Canada defence procurement projects. This is a unique situation. More than \$40 billion CDN in aerospace contracts will be awarded in defence in Canada over the next four years."

**WORKING
GROUP
MEMBERS
2019**

Marc Bigaouette, Director, Optimized Weapon System Support CH-146 - *Bell Textron Canada*

Philippe Bisailon, Director, Business Development, Surveillance and Intelligence
MDA

Patrick Bouchard, Coordinator, Land and Maritime Transport - *Ministère de l'Économie et de l'Innovation*

Luc Boucher, Vice President, Operations, North and South America - *Ocean Software*

Badr Boushel, Technical Sales Manager
Mannarino Systems and Software

Nick Chalkiadakis, Business Unit Director, Navigation Systems - *CMC Electronics*

Richard Crépeault, Director, Sales and Program Management - *Héroux-Devtek*

François Cyr, Vice President, Business Development and Marketing, U.S. and International - *PCM Innovation*

Nancy D'Agostino, Director, Governmental Affairs - *Canada Economic Development for Québec Regions*

Susan Dabrowski, Strategy, Government Relations and Business Development
Libellule Monde

Robin Demircioglu, Account Manager, Business Development & ITBs
Consortium for Research and Innovation in Aerospace in Québec

Denis Dufour, Applications Scientist, Defence, Security and Aerospace unit - *INO*

Nicolas Dugay, Director, Business Development
In-Sec-M

Marie-Christine Flibotte, Marketing Communications and Inside Sales Specialist
Solaxis

Stephan Fogaing, Advisor, Industrial Development, Aerospace Sector
Ministère de l'Économie et de l'innovation

Joe Gazalé, Manager, Business Development and Industrial Participation - *L3Harris Technologies*

Jean Hurtubise, Director, Business Development
CAE

Xavier Kauza, Sales Director - *Thermetco*

Jarred Knecht, President - *Promark Electronics*

Patrice Lavoie, Vice President, Sales and Business Development - *Varitron*

Marc Leblanc, Senior Director, Business Development - *L3Harris Technologies*

Sylvain Lefrançois, Consultant, Business Development
Safran Electronics & Defense Canada

Lorenzo Marandola, President
M1 Composites Technology

Marc Moffatt, Director General
Unmanned Aerial System Centre of Excellence

Helio Pazinato, Analyst, Strategy and Corporate Development - *Bombardier*

Patrick Pharand, Director, Business Development, Mission Systems - *Collins Aerospace*

Laurent Pieraut, Chief Executive Officer
CS Canada

Gilles Sarrazin, Industrial Technology Advisor, Industrial Research Assistance Program
National Research Council Canada

Alain Thilloy, Director, Systems
MTLS Aerostructure

Éric Tremblay, Director, Business Development, Security and Defence - *Pratt & Whitney Canada*

Erica Zoia, Business Development Director
InnoSecur

SDQuébec

SECURITY DEFENCE

SDQUÉBEC, A GAME-CHANGING INITIATIVE

To facilitate exchanges and highlight the skills and know-how of Québec companies, Aéro Montréal created and operates SDQuébec (sdquebec.ca) in partnership with Sous-Traitance industrielle Québec (STIQ), Québec International and the Ministère de l'Économie et de l'Innovation. SDQuébec is a collaborative, informative and proactive business platform for the development of Québec companies in the defence and national security sector. An excellent reference tool, SDQuébec is above all a one-stop shop where key players from here, Canada and abroad can connect.

In 2019, SDQuébec had more than 511 member companies and 2,816 business opportunities were posted. Other activities, such as webinars and training, are also presented by SDQuébec. The team is collaborating with McGill University to develop intelligent algorithms that will improve the efficiency and quality of searches for potential defence-related content. In 2019, several improvements to the SDQuébec platform were made possible thanks to the support of the governments of Québec (MEI) and Canada.

A PORTAL APPRECIATED BY USERS

"The SDQuébec portal gives Bell Textron Canada the opportunity to access a vast database of suppliers, receive calls for tenders relevant to targeted areas, and stay abreast of business opportunities presented by Aéro Montréal to promote the growth of the aerospace industry in Québec."

Marc Bigaouette

Director, Optimized Weapon System Support CH-146
Bell Textron Canada

"Right now, SDQuébec has become my go-to platform for learning about all defence-related activities and obtaining information about business opportunities. It allows me to quickly find out about projects and saves me a considerable amount of time. I can browse the hyperlinks provided for only the contracts that interest me specifically."

Phil Cole

Vice President, Business Development
Marinvent Corporation



DEFENCE SEMINAR 2019

The second edition of this seminar was held on April 15 at the Palais des congrès de Montréal during International Aerospace Week - Montréal 2019. The day was devoted to an overview of the Royal Canadian Air Force's major procurement projects over the next several years, disruptive technology challenges, and cybersecurity. Some 320 people took part and more than 250 meetings were organized in parallel with the seminar.



"Canadian defence markets represent a unique opportunity for Québec aerospace companies to diversify their activities and participate in the global innovation network, in addition to establishing technological and commercial partnerships with companies internationally or from elsewhere in Canada," explains Pierre Fitzgibbon, Minister of Economy and Innovation.



Serge Cormier, Parliamentary Secretary to the Minister of National Defence Canada.

TRAINING SESSIONS ON THE CANADIAN AND US MARKETS

Both two-day training sessions enabled more than 50 participants to learn more about these markets. They were made possible thanks to the support of Services Québec.



CAE INDUSTRY DAY ON FIGHTER JET PROGRAM

CAE hosted 30 SMEs as part of an Industry Day. This world-class firm presented its needs in terms of mission systems and the preparation of training material for the training of pilots of future fighter aircraft. Participating SMEs will now be better able to establish business relationships with this large company.

Three other Industry Days were organized in 2019, in collaboration with L3Harris Technologies, Airbus Defence and Space and Babcock. Some 40 companies participated. In addition, an Industry Day on Innovation related to Industrial and Technological Benefits (ITBs) was held in collaboration with Canada Economic Development. Some 50 people attended.



**WORKFORCE,
COMPETITIVENESS AND
REGULATIONS**

Many companies in Québec’s aerospace cluster work in MRO (maintenance, repair and overhaul). They share common challenges and, until now, have had no forum for collaboration within Aéro Montréal.

This is why this working group was created in 2019. Its mandate is to promote the excellence of the Québec MRO sector worldwide through a concerted approach involving players with cutting-edge expertise. This year, three working committees were set up to support its activities.

WORKING GROUP OBJECTIVES:

- Ensure the sustainability and outreach of the MRO sector to strengthen its position as an international player in an increasingly competitive market.
 - Promote the appeal of MRO shops.
 - Strengthen the strategic positioning and competitiveness of Québec companies offering MRO services.
 - Work to ensure that regulations do not hamper the sector’s growth.
- WORKING GROUP COMMITTEES**
- The Workforce committee’s mandate is to develop strategies to attract and retain human resources in the MRO sector.
 - The Competitiveness committee’s mandate is to promote the consolidation of the sector to offer a full range of maintenance and repair services.
 - The Regulation committee’s mandate is to help support the evolution of the industry’s regulatory environment.



Timothy Ayoub, Working Group President
Director, Integrated Logistics Support
L3Harris Technologies

“Innovative solutions will multiply by combining the expertise and valuable experience already in place within companies with new resources knowledgeable about the latest technologies. Investing to attract young talent is becoming a key success factor by enhancing competitiveness and promoting the sustainability of our MRO companies.”

**WORKING
GROUP
MEMBERS
2019**

Timothy Ayoub, Director, Integrated Logistic Support - *L3Harris Technologies*

Jean-Pierre Bastien, Vice President, Operations *Premier Aviation*

Sabino Buontempo, Director of Operations *Rolls-Royce Canada*

Philippe Burton, Partner - *Leaders International*

Arnaud Cautru, Director of Finance *AJW Technique*

Geneviève Dalcourt, Director, Continuing Education and Business Services *Cégep Édouard-Montpetit*

Patrick Ducharme, Senior Manager, Contracts and Business Development, Flight Operations *Pratt & Whitney Canada*

Jean-Marc Dufour, President *Association québécoise du transport aérien (AQTA)*

Michel Gagnon, Vice President and Chief Operating Officer - *Pole Air Aviation*

Guillaume Gasparri, Executive Vice President, Business Development - *DCM Group*

Toby Gauld, Founder and President - *Optima Aero*

Stéphane Germain, Director of Operations *Execaire*

Sébastien Godart, Director, Business Development *Altitude Aerospace*

Benjamin Hamel, Head of Business Development, DataHub, Americas - *SITA OnAIR*

Francis Labonté, Technical and Quality Director *Luxia Innovation*

Denis Mailloux, Director, Quality and RPM *CanRep*

Guillermo Moyanno, International Trade Advisor, Asia-Pacific and Oceania Markets - *Export Québec*

Gilles Néron, Senior Director, Strategic Procurement *Air Canada*

Yves Patrice, Sales Director, Engine Services, North America - *Lufthansa Technik*

Patrick Phillips, Vice President, Business Development - *Tulmar*

Marie-Noëlle Pronovost, Director, Commercial Operations - *Air Inuit*

Sylvain Savard, President - *Avianor*

Wayne Tessier, General Manager - *Auray Sourcing*

Jean Trépanier, Director, Quality Assurance and Technical Training - *Air Transat*

MRO WORKING GROUP COMMITTEES

	WORKFORCE	COMPETITIVENESS	REGULATION
	Promote MRO trades and optimize access to labour	Identify and promote capabilities of companies in the sector	Update regulations to ensure they don't hamper competitiveness
LEADER	Wayne Tessier <i>Auray Sourcing</i>	Patrick Phillips <i>Tulmar</i>	Michel Gagnon <i>Pole Air Aviation</i>
PARTICIPANTS	Jean-Marc Dufour, AQTA Jean-Pierre Bastien, Premier Aviation Geneviève Dalcourt, ÉNA Denis Mailloux, CanRep Jean Trépanier, Air Transat	Arnaud Cautru, AJW Technique Michel Gagnon, Pole Air Aviation Sabino Buontempo, Rolls-Royce Canada Francis Labonté, Luxia Innovation Toby Gauld, Optima Aero	Jean Trépanier, Air Transat Sylvain Savard, Avianor Denis Mailloux, CanRep Jean-Marc Dufour, AQTA Jean-Pierre Bastien, Premier Aviation



A WORKING GROUP
GROWING
WITH THE INDUSTRY

The RPAS (remotely piloted aircraft systems) committee, launched in 2017, became a working group in 2019 in view of the growing importance of this sector of activity. The working group collaborates closely with the Unmanned Aerial System Centre of Excellence (UAS-CED) in Alma.

In Canada, the RPAS sector represents more than 22,000 jobs in 1,000 companies, mainly in Alberta and Ontario. Québec must play a greater role in this market and this is the main mandate of the working group.

In addition to its regular meetings, the working group participated in the Aerospace Industries Association of Canada (AIAC) Technology and Innovation Committee to collaborate in developing innovative projects and make regulatory recommendations for activities such as flights out of visual range (BVLOS). It also contributed to the implementation of the RPAS Québec portal, which already lists 90 companies in the sector and offers a collaborative platform.

WORKING GROUP OBJECTIVES

- Bring together and create synergies within Québec's RPAS community to represent and defend the interests of the sector's players with a common voice while contributing to the sector's vitality.
- Support the growth of the Québec RPAS sector internationally.
- Work on the strategic positioning and representation of the Québec RPAS sector.
- Promote commercialization.

WORKING GROUP MEMBERS 2019

Hélène Beaugrand Champagne, Project Manager
Comité sectoriel de main-d'oeuvre en aérospatiale

Sylvain Bourque, Civil Aviation Safety Inspector, Remotely Piloted Aircraft Systems (RPAS) Task Force, BVLOS team - *Transport Canada*

Nicholas Brodeur, Technical Specialist
Bell Textron Canada

Pascal Chiva-Bernard, President and Cofounder
ARA Robotique

Phil Cole, Vice President, Business Development
Marinvent Corporation

Louis Deschênes, Deputy Director of Studies
Cégep Édouard-Montpetit

Audrey Falcucci, Project Manager
Consortium for Research and Innovation in Aerospace in Quebec

Stephan Fogaing, Advisor, Industrial Development, Aerospace Sector - *Ministère de l'Économie et de l'Innovation*

Jean-Sébastien Jetté, Aviation Safety Advisor - Drones - *Hydro-Québec*

William De Keiser, Director, Cluster of Excellence
UAS Centre of Excellence

Enrick Laflamme, Co-Founder - *Laflamme Aéro*

Normand Landry, Partner and Vice President, Americas - *Explorer solutions*

Sébastien Long, Canadian Sales Manager
Microdrones

Marc Moffatt, Director General
UAS Centre of Excellence

David Neveu, Project Manager - *NGC Aerospace*

Laurent Pieraut, Chief Executive Officer
CS Canada

Anne-Sophie Riopel Bouvier, President
EXO Tactik | Air Support

Stéphane Roy, Strategic Product Owner - *Presagis*

Marc St-Georges, Senior Business Development Analyst - *Bombardier*

Abdo Shabah, Founder and Chief Executive Officer - *Humanitas Project*

Roxanne St-Louis, Manager, Charter, Aviation Safety and Drones - *Hydro-Québec*

Marc-André Talbot, Director, Research and Development - *Thales Canada, Avionics*

John Valley, Deputy Director - *Exo Drone*

Charles Vidal, Aerial Robotics Project Lead
National Research Council Canada

Erica Zoia, Director, Business Development
InnoSecur



Marc Moffatt, Working Group President
Director General
UAS Centre of Excellence

"The RPAS sector has again stood out in many ways this year. Companies are all turning to technologies to accelerate the race for innovation. In order to stay at the forefront, the community needs to take advantage of young people who have a keen interest in new technologies. It is up to us to enable them to act as a driving force for innovation."



AÉRO MONTRÉAL AT AUVSI-XPONENTIAL 2019

Aéro Montréal attended the AUVSI-XPONENTIAL 2019 show held in Chicago in early May. This annual gathering is the must-attend event for players from the United States and around the world in the field of autonomous vehicles of all kinds. More than 8,500 people took part this year.

Aéro Montréal accompanied the 15 companies on a mission organized by Export Québec. They were interested in learning more about the needs of prime contractors in order to better position themselves as potential technology partners. We helped put these companies in touch with each other. The promotion of the StartAéro 360° Initiative at the show demonstrated that Québec is at the forefront of measures being implemented to support its industry.



UAS TECH DEMO 2019

TECH DEMO, organized by the UAS Centre of Excellence (CED) in Alma, has become a reference event for the RPAS sector in Québec. More than 150 participants attended this 2nd edition. Conferences and flight demonstrations were held to showcase the capabilities of Québec companies in a tangible way. The Government of Canada also presented advances in regulations governing this ever-changing sector.

For Aéro Montréal, the event was an opportunity to follow up on and promote the projects of the RPAS Working Group and the StartAéro 360° program.



**APRIL 15, 2019:
FIRST RPAS DAY**

Aéro Montréal organized its first day dedicated to the autonomous air vehicles industry during International Aerospace Week - Montréal 2019. The event, which brought together 200 people, focused on startups and Canadian government procurement projects and provided an opportunity to hold a number of B2B and B2G meetings.



UNMANNED CANADA 2019

Bringing together the Canadian autonomous vehicle industry, this 17th edition of Unmanned Canada 2019 attracted 350 people for a series of conferences and workshops. Aéro Montréal participated for the first time and wishes to increase the presence of Québec industry in the years to come. In addition to bringing together potential business partners, this gathering provides an opportunity for the industry to stay abreast of legislation and regulations.



**INNOVATION,
COMPETITIVENESS
AND PRODUCTIVITY
PILLAR**



A SUCCESSFUL
SUMMIT
AND INITIATIVES
PROPELLING
OUR SMES

The Green and Intelligent Supply Chain Working Group devoted much of its early-year activities to the preparation and coordination of the Global Supply Chain Summit, which brought together more than 600 participants during International Aerospace Week - Montréal 2019.

The MACH Initiative, supported by the working group, continued to deliver results and was extended to offer improvement cycles to all the enrolled cohorts.

The project team also launched the “Large Manufacturers’ Vision” project. Its objective is to gather information on the procurement strategies and technological orientations of large local and global manufacturers. This review, which will be published in 2020, will make it easier for our SMEs to penetrate these markets.

A community of practice was set up to discuss issues related to the updating of the REACH directive, since our companies’ compliance with it enhances their competitiveness. The Growth Working Group is also participating in this community. This project has three objectives:

- Harmonize qualification initiatives and define an action plan to ensure compliance requirements are met regarding critical sunset dates for substances of very high concern or SVHC.
- Maintain the competitiveness of the Québec supply chain to help win supply contracts.
- Facilitate the upgrading of Québec suppliers’ installations to improve business efficiency (energy, industrial, etc.).

The working group also promoted the MACH FAB 4.0 Initiative by producing a video.



Louis Marc Pinard, Working Group President
General Manager
Arconic

“The aerospace industry is undergoing a profound transformation, with global competition and stakeholder expectations greater than ever. To stand out, Québec’s supply chain must also change by rethinking its traditional business models and integrating innovative technologies that will enable it to perform better, remain competitive and occupy specialized niches. This transformation also requires, among other things, a dynamic new generation of people who are familiar with 4.0 technologies.”

WORKING GROUP MEMBERS 2019

Marc Bigras, Vice President and Chief Operating Officer - *Groupe Meloche*

Francis Cloutier, Director, Procurement
Bombardier

François Cyr, Vice President, Business Development and Marketing, U.S. and International
PCM Innovation

Jacques Dodier, Advanced Sourcing Director, Procurement - *Pratt & Whitney Canada*

Éric Faucher, President and Chief Executive Officer
Hutchinson, Aerospace and Industry

Hélène Houde, Director, Global Strategic Sourcing
CAE

Louis Marc Pinard, General Manager - *Arconic*

Jean Proteau, Co-President - *APN*

Danielle Savage, Senior Purchasing Manager
Bell Textron Canada

WORKING GROUP OBJECTIVES

- Target, analyze and communicate changes and transformations in global supply chains.
- Deploy tools, mechanisms and resources based on changing industry needs and realities.
- Ensure the planning and implementation of a concerted action plan to enhance competitiveness.

WORKING GROUP INITIATIVES

INITIATIVE	MACH
CATEGORY	Operational efficiency
YEAR CREATED	2012
OBJECTIVE	Promote collaboration and innovation within the supply chain and improve supplier performance and competitiveness. The process involves five steps: 
PARTNERS	Government of Québec Canada Economic Development for Québec Regions Montréal Metropolitan Community
NUMBER OF PARTICIPANTS	68 companies
FUNDING	More than \$13 million invested in these projects

2019 Results

- 5 active cohorts.
- 68 companies supported under the Initiative.
- MACH obtained additional funding from MEI, enabling all the companies in the program to complete their five improvement cycles.

WORKING GROUP INITIATIVES

INITIATIVE	MACH FAB 4.0
CATEGORY	Operational efficiency
YEAR CREATED	2016
OBJECTIVE	Fostering the integration of digital and advanced manufacturing technologies within participating SMEs
PARTNERS	CEFRIO STIQ AÉROÉTS Ministère de l'Économie et de l'Innovation
FUNDING	A \$19 million Initiative, including \$9.5 million in public funds

2019 Results

- 42 improvement cycles in progress or completed.
- 110 projects in progress or completed.
- 5 companies participating in collaborative initiatives.
- 37 SMEs active in the program.
- A call for projects that enabled 9 other companies to join the Initiative.

5TH GLOBAL SUPPLY CHAIN SUMMIT

Held every two years in Montréal during International Aerospace Week, the 2019 Summit aimed to identify, analyze and communicate changes and transformations taking place in global supply chains.

Entitled *Artificial Intelligence, Reinventing the Aerospace Supply Chain*, the event aimed to demystify the concept of artificial intelligence (AI) and present its concrete applications in the factory of tomorrow. To achieve this, all aspects of the chain were addressed. Ultimately, the Summit will have provided an understanding of the impact of AI on the supply chain and the levers available to companies to take the step towards integrating AI into their production.

With this in mind, the event was organized in strategic partnership with SCALE AI, Canada's artificial intelligence supercluster dedicated to building the next generation of supply chains and driving industrial performance.

The Summit brought together a large number of prestigious local and international speakers. They included the Honourable Navdeep Bains, Minister of Innovation, Science and Industry; Alain Bellemare, President and Chief Executive Officer of Bombardier; Philippe Balducchi, Chief Executive Officer of Airbus Canada; and Iain Stewart, President of the National Research Council Canada. Speakers from four countries, including Canada, were also in attendance, namely

Kevin Michaels of AeroDynamic Advisory (United States), Erik Goedhart of Kuehne+Nagel (Switzerland), and Marco Protti of Leonardo Aircraft Division (Italy).



During the Summit, Aéro Montréal and the Institut de valorisation des données (IVADO) signed a partnership agreement on AI and their applications for the aerospace sector. The agreement aims to promote and accelerate the emergence of AI projects in aerospace and to support SMEs in their transition to Industry 4.0. Aéro Montréal and IVADO plan to collaborate in setting up a working committee and organizing events highlighting the many innovations and business opportunities generated by AI.



Many media outlets from Canada and around the world (22) covered the Summit. Stelia, Bell Textron Canada and CAE also welcomed them to their facilities during industrial visits. Aéro Montréal and Aviation Week, one of the world's leading industry weeklies, had signed a media partnership.

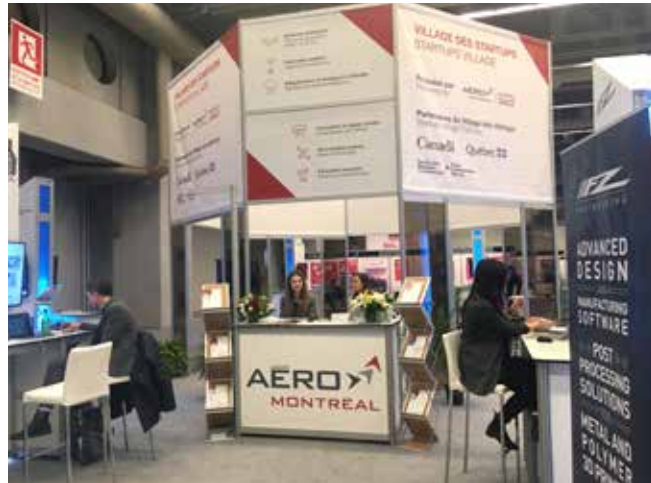


Thanks to the support of Services Québec, a roundtable discussion on the impact of artificial intelligence on human resources was on the agenda. Krista Robinson, partner and head of the Québec aerospace sector at Ernst & Young, expertly led the panel.



AÉROMART MONTRÉAL 2019 – A HUGE SUCCESS!

The AéroMart Montréal 2019 trade show took place at the same time. The 1,400 visitors of this edition were able to meet 800 companies from 25 countries. It is estimated that more than 10,000 business meetings were held in conjunction with the event.



STARTUPS VILLAGE

At Aéromart Montréal 2019, a trade show held as part of International Aerospace Week, Aéro Montréal innovated by hosting a startups village that shined the spotlight on young entrepreneurs who are helping to push the frontiers of artificial intelligence. In this space, companies and startups were able to discuss breakthroughs and their technological applications and hold many business meetings with potential local and international partners.

4.0 ORIENTATION DAY: A NEW FORMULA!

At the end of each year, Aéro Montréal brings the industry together to discuss future economic trends. 4.0 Orientation Day was held on December 2 in Boucherville. A program of conferences and case studies allowed participants to understand why many companies have embarked on this technological transformation.



Benoit Poirier, General Manager and Research Analyst, Industrial Products, Transportation and Aeronautics, Desjardins Securities, presented the economic trends for 2020.

Finally, Guy LeBlanc, President and Chief Executive Officer of Investissement Québec (IQ), closed the day with a conference on the theme “The New IQ: Evolving for the Benefit of Québec Entrepreneurs and Businesses.”

This event was made possible thanks to a partnership between STIQ and Aéro Montréal, with the participation of Ministère de l'Économie et de l'Innovation, Canada Economic Development and CEFRIQ.



WHEN MACH GETS EXPORTED TO THE ATLANTIC PROVINCES!

During the 4.0 Orientation Day, Aéro Montréal and the Atlantic Canada Aerospace and Defence Association (ACADA) signed a collaborative agreement to launch the MACH Initiative in Atlantic Canada. The agreement, signed by Suzanne M. Benoît and Carl Kumpic, Vice President of ACADA, grants an exclusive licence to use and deploy the MACH Initiative in the Atlantic region.

“This is an absolutely exciting project that builds on the success of Aéro Montréal’s MACH Initiative and will help enhance the global competitiveness of manufacturers and suppliers in the aerospace and defence sector in Atlantic Canada. We look forward to working closely with the Aéro Montréal team to implement and develop the MACH-Atlantic Initiative for ACADA members.”

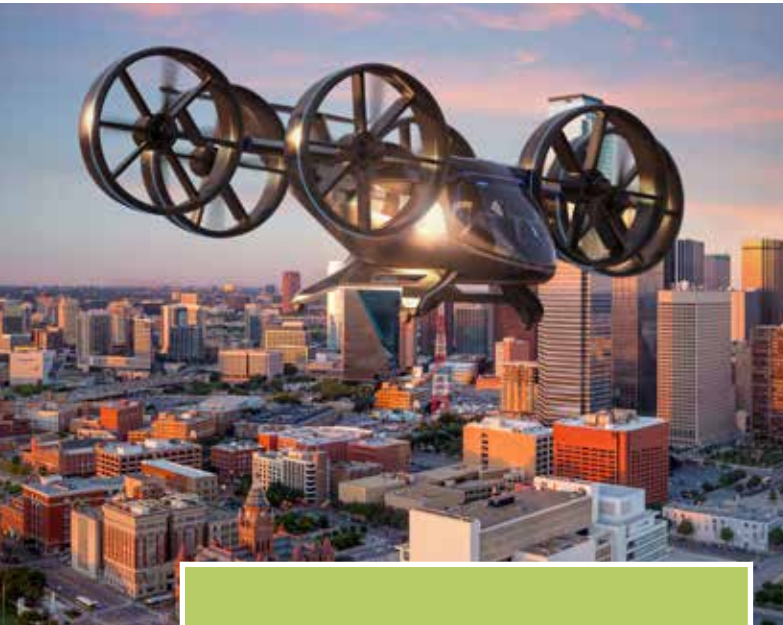
Carl Kumpic
Vice President, ACADA

AÉRO MONTRÉAL IN GERMANY

At the beginning of April, an economic mission travelled to Germany to participate, among other things, in the Aircraft Interiors Expo 2019 (AIX), a major industry trade show in Europe. This mission provided an opportunity for business-to-business meetings with OEMs, equipment manufacturers and Tier 1 to Tier 3 suppliers in the areas of cabin interiors, systems, structures and advanced manufacturing, as well as maintenance, repair and overhaul. The mission was jointly organized by the Canadian German Chamber of Industry and Commerce, Aéro Montréal, CRIAQ and Hamburg Aviation.

In April, Minister Pierre Fitzgibbon and Suzanne M. Benoît travelled to Hanover to participate in the Hannover Messe trade fair. In collaboration with Dr. Franz Josef Kirschfink, Chief Executive Officer of the German cluster, they welcome the Québec delegation at the Hamburg Aviation kiosk. This mission aimed at bridging with the companies and organizations in attendance.





**SUSTAINABLE
MOBILITY
AT THE HEART
OF OUR ACTIONS**

Created in 2006, the working group aims to ensure that Québec's aerospace industry develops and maintains its capacity for innovation in our highly competitive sector. It does so, in particular, by actively monitoring the technological capabilities of Québec companies and by ensuring a presence at events and activities devoted to startups.

The working group works in close collaboration with the Consortium for Research and Innovation in Aerospace in Québec.

WORKING GROUP OBJECTIVES

- Establish an initiative to develop an aerospace innovation strategy for Québec.
- Identify and coordinate initiatives to structure projects in support of the innovation strategy.
- Work together with other innovative organizations to ensure proper coordination and avoid duplication of efforts.
- Monitor innovation activities in Québec and identify the main players.



Fassi Kafyeke, Working Group President
Senior Director, Innovation
Bombardier

"The projects developed by our working group are extremely beneficial for our SMEs since they are called upon to work closely with prime contractors. R&D is one of the main drivers for ensuring the competitiveness of our companies on the international scene. Thanks to this collaboration, more innovative products that better meet market expectations can be designed."

**WORKING
GROUP
MEMBERS
2019**

Ouassima Akhrif, Professor, Electrical Engineering Department, Interim Director AÉROÉTS (2019-2020) - *École de technologie supérieure*

Houssam Alaouie, Director, Research and Development Programs and Relations with Higher Education Institutions - *CAE*

Francis Archambault, Assistant General Manager *Centre technologique en aérospatiale*

François Arrien, Vice President, Robotic Finishing and CTO - *AV&R*

Alain Aubertin, President and Chief Executive Officer *Consortium for Research and Innovation in Aerospace in Québec*

Marco Blouin, Director, Innovation Sector, Networking and Partnerships *Ministère de l'Économie et de l'Innovation*

Sylvain Boisvert, General Manager, Canada *Safran Canada*

Mikael Cardinal, President and Chief Executive Officer - *Zenith Altitude*

Patrick Champagne, Vice President, Corporate Government Relations - *CMC Electronics*

Cyrille Chanal, President - *Fusia*

Phil Cole, Vice President, Business Development *Marinvent Corporation*

Jean Colpin, Industrial Advisor, MIAE *McGill University*

Guillaume Côté, Director, Strategy *Collins Aerospace*

Mélissa Côté, Manufacturing Engineering Manager, Metrology and Repair Technology *Rolls-Royce Canada*

Susan Dabrowski, Strategy, Government Relations and Business Development *Libellule Monde*

Mathieu Demers, Head of Maintenance Business Unit (MRO and Interiors) - *Avianor*

Michel Dion, Manager, Innovation *Bell Textron Canada*

François Garnier, Professor, Mechanical Engineering Department and Director AÉROÉTS *École de technologie supérieure*

Fassi Kafyeke, Senior Director, Innovation *Bombardier*

Bob Katz, President - *Katz Design*

Denis Lacroix, Scientific Advisor *Centre technologique en aérospatiale*

Anne-Marie Lan Phan, Head, Intellectual Property Management and Technology Transfer *Canadian Space Agency*

Sylvain Larochelle, Technology Collaboration Office Manager - *Pratt & Whitney Canada*

Éric Laurendeau, Professor, Mechanical Engineering - *Polytechnique Montréal*

Dominique Leroy, Sector Officer, Aerospace and Defence, Strategic Policy Sector *Innovation, Science and Economic Development Canada*

Jonathan Lévesque, Director, Business Development and Partnership - *INO*

Mouhab Meshreki, Director, Research and Development - *National Research Council Canada*

Christian Moreau, Professor, Mechanical and Industrial Engineering, Director of CIADI *Concordia University*

Dany Paraschivoiu, Program Leader, Aircraft Product Development Technologies *National Research Council Canada*

Éric Roberge, Chief Financial Officer and Owner *Luxia Innovation*

Peter Rosenthal, Industrial Technology Advisor *National Research Council Canada*

Jean Roussel, Strategic Specialist, Engineering Solutions - *L3Harris Technologies*

Philippe Sabat, Industrial Development Advisor, Transportation and Sustainable Mobility Division *Ministère de l'Économie et de l'Innovation*

Dominique Sauvé, Director - *SA²GE*

Marc-André Talbot, Director, Research and Development - *Thales Canada, Avionics*

THREE MAJOR INNOVATION PROGRAMS



SA²GE greener aircraft mobilization project: Additional investment of \$50 million

The SA²GE project was set up in 2010 by the government as part of the Québec Research and Innovation Strategy (QRIS). The initiatives launched under this project are all aimed at promoting innovation, mobilizing Québec industry (SMEs, universities and research centres), and environmental sustainability. Aéro Montréal is actively involved in the governance and activities of this project.

On February 22, Minister Pierre Fitzgibbon announced \$50 million in public-private funding for the third phase of the SA²GE project. It was launched in the summer of 2018 and is scheduled to continue until 2021.

Four initiatives have been selected for this phase, led by Bell Textron Canada, Bombardier, CMC Electronics and Teraxion. Phase 3 will support projects such as air taxi propulsion, a more efficient airplane wing inspired by nature, the development of new navigation technologies and high-speed photonic modules.

AÉRO21 – 21st century technologies for aerospace

This new program, similar in organization to the SA²GE project, will support work in advanced manufacturing (Factory 4.0, additive manufacturing) and digital technologies, including avionics and “virtual aircraft” testing. The Government of Québec, Bombardier, Pratt & Whitney Canada and CMC Electronics are the founding partners of this mobilizing strategic project.

The government announced an initial contribution of \$16.25 million for AÉRO21 in February 2019, for a total investment of \$65 million.

DIMLA international collaboration project

The Digitalization and Internationalization Maturity Level in Aerospace (DIMLA) project aims to develop a flexible and adaptive key performance indicator (KPI) grid system that helps assess the maturity levels of SMEs in the aerospace industry.

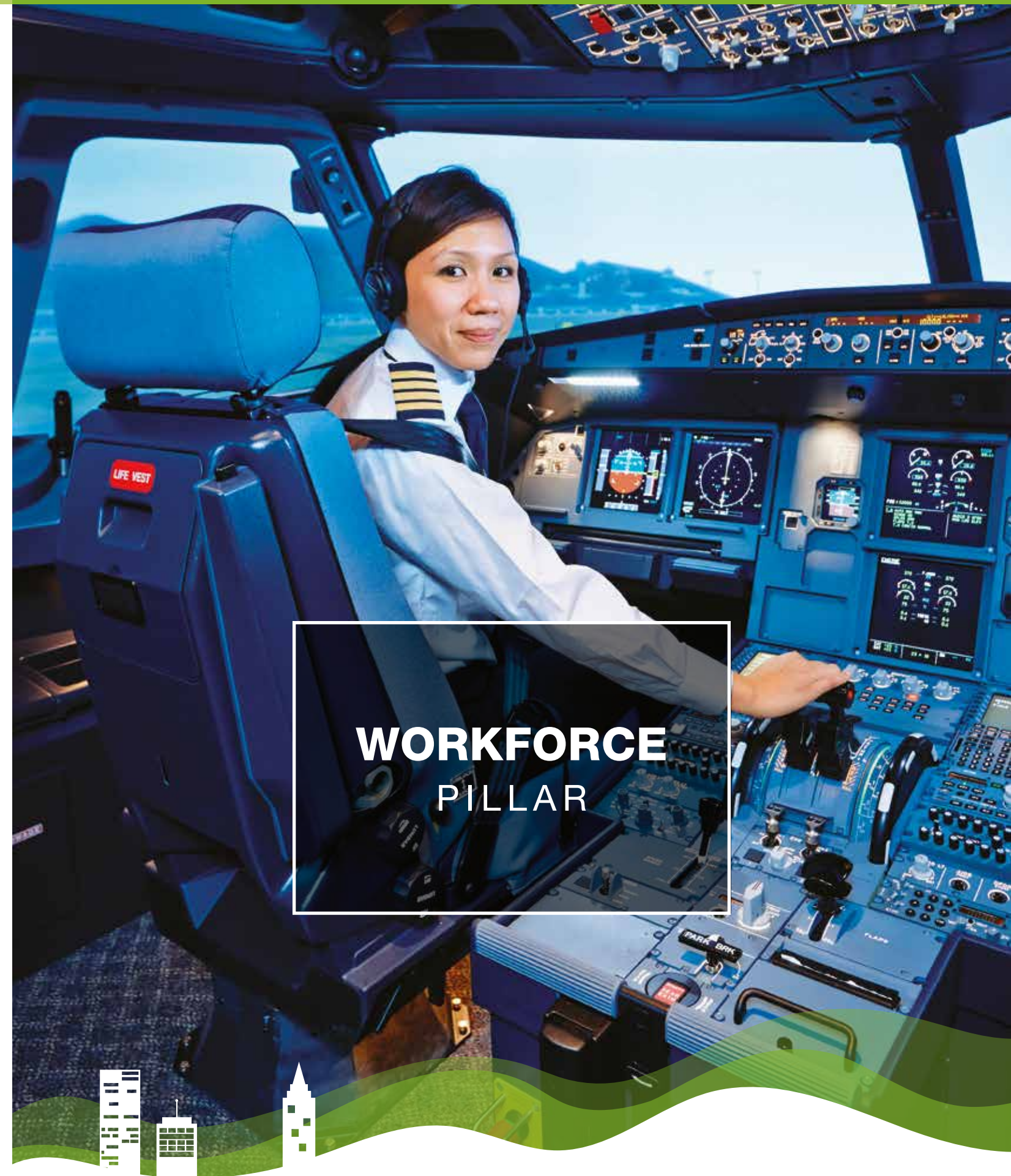
The jointly developed system will be applied and tested with companies in Montréal and Hamburg. The grid of key performance indicators will help improve business and manufacturing processes and enhance existing business models. The tool is expected to improve workflow efficiency and make it easier for SMEs to integrate into the global aerospace supply chain.

DIMLA is a joint German-Québec project. It combines the expertise of various partners from interest groups, academic institutions and consultants. These include Hamburg Aviation, Hanse-Aerospace, Hamburg University of Technology, Aéro Montréal, École de technologie supérieure (Montréal) and APN, an SME in the Québec City area.

ICAO INNOVATION SHOW 2019

Aéro Montréal attended the ICAO Innovation Show on September 22 and 23 at ICAO’s headquarters in Montréal. The event brought together more than 300 participants and 52 exhibitors.

This show aimed to bring together the most innovative players in the traditional aviation sector as well as newcomers, many of whom are redefining the way we think about flight and powered flight operations. It also aimed to underscore the international aviation community’s historic ability to cooperate and innovate. Aéro Montréal wanted to stay abreast of international trends in new technologies and to ensure the representation of the aerospace industry in the Québec Pavilion, which featured 21 exhibitors.





SUCCESSION,
DIVERSITY
AND INCLUSION

There is an acute need for labour in our industry. Over the next 10 years, approximately 37,000 positions will need to be filled in the sector. These people will also have to be adequately trained to best integrate technological advances.

At the beginning of 2019, as workers in the industry became available, Aéro Montréal was given the responsibility by Services Québec to lead efforts aimed at helping them find new jobs. These included holding recruitment activities and leveraging the AeroPortal. Given the scarcity of labour, almost all of the workers returned to the industry.

A large number of activities and events were organized by the working group to support the next generation of aerospace workers and prepare companies to welcome workers from all walks of life.

WORKING GROUP OBJECTIVES

- Attract and mobilize young people and encourage them to develop a passion.
- Implement the recommendations of the various white papers to support current and future workforce development.
- Promote the intergenerational transfer of knowledge to ensure business succession and competitiveness.
- Bring together the various industry partner organizations in order to respond in a concerted way to growing labour needs.

WORKING GROUP COMMITTEES

- Heritage Committee: Intergenerational knowledge transfer
- Internship Committee: Facilitate work-study programs at vocational high schools, technical colleges and universities
- Skills 4.0 Committee: Promote the content and recommendations of the 4.0 Industry Skills Sets for Aerospace Guide published by Aéro Montréal in 2018



Kevin P. Smith, Working Group President
Vice President, Human Resources
Pratt & Whitney Canada

“The development and future growth of our aerospace industry depends in large part on our ability to attract, train and retain human capital. More than ever, diversity, inclusion and equity must be intrinsic values of companies to ensure the succession of our aerospace workforce.”

WORKING GROUP MEMBERS 2019

Arianne Blanchette, Vice President, Human Resources - DCM Group

Kathleen Bernier, Senior Business Partner, Human Resources - L3Harris Technologies

Jean-Simon Blanchette, Business Partner, Human Resources - Bell Textron Canada

Isabelle Carle, Director, Human Resources Sonaca Montréal

Geneviève Dalcourt, Director of Continuing Education and Business Services École nationale d'aérotechnique

Jacques De Carufel, Director, Operations FDC Aéro Composites

Éric Dionne, Director - École des métiers de l'aérospatiale de Montréal

Jocelyne Dujmovic, Director, Human Resources Hutchinson, Aerospace and Industry

Louis-Marie Dussault, Associate Director, Studies - École nationale d'aérotechnique

Manon Fafard, Vice President, Human Resources Bombardier

Sébastien Farkas, Director, Programs Groupe Meloche

Solange Fresneau, Director, Corporate Affairs and Administration - PCM Innovation

Rita Haddad, Business Partner, Human Resources - Rolls-Royce Canada

Tatiana Montes, Director, Human Resources Leesta

Geneviève Nantel, Director, Human Resources Stelia North America

Nathalie Paré, Executive Director Comité sectoriel de main-d'œuvre en aérospatiale

Sonia Pérusse, Director, Human Resources Héroux-Devtek

Clothilde Petitjean, Director, Programs Consortium for Research and Innovation in Aerospace in Québec

Claude Picard, Director, Work Organization and Training - Pratt & Whitney Canada

Jessica Roy, Director, Human Resources and Communication - Atlas Aéronautik

Kevin P. Smith, Vice President, Human Resources - Pratt & Whitney Canada

Guy Tchakouté, Advisor, Strategy, Marketing and Business development ESG+

Jennifer Vaughan, Leader, Talent Acquisition CAE

Benoit Villien, Technology Manager Siemens Canada

OBSERVERS:

Guillaume Bégin, Advisor, Industrial Development, Direction des transports et de la mobilité durable Ministère de l'Économie et de l'Innovation

Réjean Charbonneau, Director, Direction régionale adjointe aux opérations, Mesures et services aux entreprises, Direction régionale de l'Île-de-Montréal Services Québec

Donald H. Violette, Regional Coordinator, Partenariats et stratégies, Direction régionale adjointe aux opérations, Mesures et services aux entreprises, Direction régionale de l'Île-de-Montréal - Services Québec

WORKING GROUP INITIATIVES

INITIATIVE	PASSION FROM WITHIN AND PASSION FOR FLIGHT
CATEGORY	Mobilization of current and future workforce
OBJECTIVE	Classroom and day camp activities to introduce students to airplanes and aerospace in a fun and creative format
PARTNERS	Government of Québec (MEI), Fondation Arconic, Cosmodôme, school boards, educational institutions

2019 Results

- More than 11,000 elementary and high school students participated in the program at school or at the Cosmodôme in 2019.
- Rêve d'envol (3D animation) seen by 6,000 young people.

WORKING GROUP INITIATIVES

INITIATIVE	AEROPORTAL
CATEGORY	Mobilization of current and future workforce
YEAR CREATED	2014
OBJECTIVE	To showcase careers and occupations in the aerospace industry, and to centralize information and job postings in the sector to make them accessible to the general public and to professionals seeking employment.
PARTNERS	Government of Québec (MAMH and Services Québec) Montréal Metropolitan Community Comité sectoriel de main-d'œuvre en aérospatiale
NUMBER OF PARTICIPANTS	Nearly 20,000 subscribers on Facebook and more than 1,000 on LinkedIn

2019 Results

- 20,000 users of the site.
- 108,850 pages viewed.
- 18-34 year-olds represent 60% of visitors.

THE INCLUSIVE ORGANIZATION OF TOMORROW

Hundreds of participants from various sectors attended the forum



Aéro Montréal launched the Inclusive Organization of Tomorrow forum on March 8, 2019. More than 300 participants from various sectors of the Québec economy attended this event, which was a unique opportunity to celebrate diversity and inclusion within organizations. This forum was made possible by the support of Services Québec.

Held during International Women's Day, the event proved to be an effective platform for discussing the strengths, challenges and solutions regarding fostering the inclusion of under-represented groups within companies and society.

Several major corporations partnered with the event, including Ahkwasáhsne Mohawk Board of Education, Airbus Canada, Air Canada, Bombardier, CAE, Desjardins, EY Canada, GSoft, Hydro-Québec, Moment Factory, Pratt & Whitney Canada, Société de transport de Montréal, TOHU, Ubisoft Montréal and the Université de Montréal.



"I am very pleased by the energy and actions being taken by Aéro Montréal to meet the challenges of labour scarcity and skills development. We all need to rethink our ways of doing things to meet the new realities of the labour market," said Jean Boulet, Minister of Labour, Employment and Social Solidarity and Minister responsible for the Mauricie region, who spoke at the opening of the forum.



Kim Thuy, author, speaker and moderator of the event

What are the most effective strategies for attracting and retaining top talent and supporting them on their career path? How can we guide them in their career advancement within companies? What role can leaders play in fostering an inclusive culture? What communication strategies should be used? These are some of the questions that were addressed during the conferences, panels and discussions.



In the photo, Lucie Guillemette (Air Canada), Anne-Marie Hubert (EY Canada), Julie Sbeghen (Hydro-Québec) and Houssam Alaouie (CAE) participated in the roundtable on "Leadership as a lever for diversity and inclusion." Selena Lu (Lapointe Rosenstein Marchand Melançon) acted as moderator.



"A strong, qualified and diversified workforce is a powerful driver for performance and innovation – factors essential for companies to continue to grow and stand out on the world stage," said Suzanne M. Benoît, President, Aéro Montréal.

FORUM FOLLOW-UPS...

Aéro Montréal published a white paper on diversified skills and equitable practices in aerospace as a follow-up to the March 8, 2019 forum. Tania Saba, BMO Professor of Diversity and Governance at the Université de Montréal, was commissioned to prepare the paper. It is based on the results of a survey conducted in the summer of 2019 among Aéro Montréal member organizations, as well as the visions and actions presented by the forum's speakers and panelists.

This white paper is designed to spark discussions and underscore the urgent need to take action on the challenges of diversity and inclusion in the deployment of an effective succession planning strategy. It proposes an integrated and pragmatic approach as well as recommendations for implementing equity, diversity and inclusion plans that take into account the changing labour market landscape.

This white paper is a reference tool to help create a work environment where each employee can develop his or her full potential.

ACADEMOS AND AÉRO MONTRÉAL JOIN FORCES TO INTRODUCE AEROSPACE TO YOUNG PEOPLE

ACADEMOS

Academos, a non-profit organization that connects young people with the reality of the working world through a virtual mentoring application, is partnering with Aéro Montréal to introduce youth and adults aged 14 to 30 to careers in the aerospace sector. The agreement will help all Québec students in making their career choices.

Aéro Montréal hopes the program will encourage young Québécois to take an interest in aerospace careers, which have a very promising future.

"By partnering with Academos and inviting its members to become mentors on the platform, Aéro Montréal is making a concrete commitment to support student perseverance and educational success, in addition to contributing to a social initiative recognized for its innovative features."

Catherine Légaré, President-Founder of Academos

THE RRAM: WHEN YOUNG PEOPLE IN THE AEROSPACE INDUSTRY ARE MOBILIZED!



Le Regroupement Relève d'Aéro Montréal (RRAM) is a multidisciplinary advisory group composed of students, recent graduates and professionals in aerospace. With an organizational committee made up of educational ambassadors and young professionals, RRAM is a unique environment for the development of the next generation.

RRAM's main mandate is to represent Québec students and young professionals who are passionate about aerospace and promote closer links with the industry by providing them with access to networking and recruitment opportunities. It organizes various events, conducts studies and promotes aerospace. Some 20 ambassadors from educational institutions (colleges and universities) make up the group's main network.

RRAM AMBASSADORS



- Samir Bakhtawar** - Université du Québec à Montréal
- Aya Bassyouni** - Concordia University
- Laurie Breton** - École nationale d'aérotechnique
- Laurence Bruneau** - École des sciences de la gestion (UQAM)
- Xavier Caissy** - Cégep de Saint-Jérôme
- Cédric Canuel** - École de technologie supérieure
- Simon Cloutier** - Cégep de Saint-Jérôme
- Jean-Philippe Côté** - Collège Montmorency
- Julien Dorion** - Young professional, Pratt and Whitney Canada
- Davis Dumas** - Université Laval
- Thomas Ernst** - École nationale d'aérotechnique
- Stéphanie Fiore** - Concordia University
- Eva Gabrielian** - Université de Montréal
- Alexandre Geoffrion** - Young professional, Stelia, North America
- Benoît Ghafar** - École de technologie supérieure
- Tayeb Idjakirene** - Air Cadets
- Frédéric Larocque** - Polytechnique Montréal
- Paul Meyran** - École de technologie supérieure
- Marc Lorfils Milord** - Polytechnique Montréal
- Daria Popescu** - École nationale d'aérotechnique
- Joshua Ptack** - Marianopolis College
- Alexandre Rivard** - Université Laval
- Guillaume Rouleau** - Université du Québec à Montréal
- Alix Sourrouille** - École de technologie supérieure
- Jérémy Viret** - École des sciences de la gestion (UQAM)

THE RRAM AT THE AÉROSALON

The École nationale d'aérotechnique held the 2019 AéroSalon, in partnership with the City of Longueuil in early June. Featuring a number of varied air shows and numerous aircraft visits, this major event welcomed thousands of people. Aéro Montréal was a partner of the event and the RRAM was on hand to meet other aviation enthusiasts.

JOBS: LA GRANDE CORVÉE OF NOVEMBER 21

Jean Boulet, Québec Minister of Labour, Employment and Social Solidarity, launched "La Grande Corvée de l'emploi", a major job fair designed to help alleviate hiring challenges faced by a large number of economic sectors. The job fair offered 150 companies and job seekers in Montréal an opportunity to meet and attracted more than 5,000 people. Aéro Montréal attended the fair and over 150 résumés were collected for companies in the aerospace sector.

WORKSHOPS ON HIRING FOREIGN WORKERS

When a company wants to hire foreign workers, the process can be complex. In the fall of 2019, 10 member companies of Aéro Montréal attended a workshop aimed at understanding the immigration steps involved and help them better access this source of labour for their company. A resounding success, said the participants!

WELCOMING INTERNATIONAL STUDENTS

The *I choose Montréal* team and Aéro Montréal, in collaboration with Montréal International, welcomed some 100 international students and a dozen companies to Centech for a major recruitment event on October 29, 2019.

IMAGE, INFLUENCE AND MARKETING PILLAR





A NEW WEBSITE AND ENHANCED COMMUNICATIONS

Québec's aerospace industry is a source of pride that stands out in Québec and abroad. The main mandate of the Branding and Promotion Committee is to support the working groups and the Aéro Montréal secretariat in their communications and public relations activities aimed at promoting the aerospace industry in Québec and around the world.

The committee is made up of representatives from the field of communications and/or working in the aerospace industry. Its members are mostly communications professionals who are recognized for their extensive experience.

COMMITTEE OBJECTIVES

- Propose innovative modes and means of communication, in line with Aéro Montréal's 2019-2021 vision: to become the most innovative cluster in the world.
- At the request of the Board or secretariat, develop major communication projects that meet the needs of the industry.
- Promote Québec's aerospace sector to cluster members and the public locally, nationally and internationally.
- Highlight the services available to current and potential members of Aéro Montréal, with a view to attracting, satisfying and retaining members.



Catherine Thibault, Committee President
Director, Public Affairs and Global Communications
CAE

"Communications and marketing are fundamental tools for the development of our industry and in the recruitment of the next generation of workers. We need to be present where the young people are if we want to be viewed in a positive light. Anything that flies makes you dream; it is our mission to nurture that dream, to introduce young people to aerospace, and to publicize our achievements here and abroad."

WORKING GROUP MEMBERS 2019

Patricia Bergeron, Communications Manager
Bell Textron Canada

Isabelle Charon, Director - Valtech

Catherine R. Cunningham, Associate Director, Public Relations and Communications
Pratt & Whitney Canada

Marlène Daugarou, Supervisor, Marketing and Corporate Communications - AV&R

Josée Gaulin, Manager, Communications and Marketing - L3Harris Technologies

Julian Lucchesi, Coordinator, Strategic Partnerships - Centech

Mark Masluch, Director, Communications and Public Affairs - Bombardier, Business Aircraft

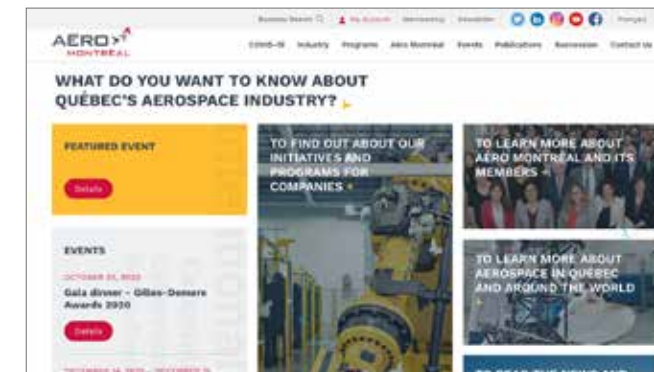
Nadine Mercure, Consultant, Communication, Marketing and Digital

Martin Perron, Chief Executive Officer - Bloom

Catherine Thibault, Director, Public Affairs and Global Communications - CAE

TWO NEW COMMUNICATIONS TOOLS

In 2019, Aéro Montréal reviewed and redesigned many of its main communication tools to better inform its customers.



A new website for the cluster

The aeromontreal.ca website was completely rethought and redesigned. It is now easier to navigate and find information, including about the people responsible for each of the projects and subjects. It has been designed with the user experience and the organization of information top of mind to make browsing pleasant, even fun.

Aéro Montréal captured in four pages

We produced a new information brochure reflecting our new strategic directions and outlining all our initiatives. It succinctly describes Aéro Montréal's full range of services.



A modern branding

In order to reflect a modern and consistent brand for our industry, Aéro Montréal has revamped its image bank used for all of its publications. These exceptional photos highlight SMEs such as Abipa, APN, L3Harris Technologies, Laflamme Aéro, MDA, Groupe Meloche, Optimum and Varitron.



Photo credit: Claude Fleury

AEROSPACE IN QUÉBEC – PORTRAITS OF SMES

This first edition of the collection profiles eight of our SMEs. Its objective is to highlight their talent to companies in our sector located abroad, particularly in the United States and Europe. It is being distributed at local and international trade shows, in addition to being published online.



SMES IN THE SPOTLIGHT

AV&R, Groupe Meloche, Humanitas Solutions, Laflamme Aéro, Luxia Innovation, Technologie M1 Composites, Thermetco and Varitron.

MACH FAB 4.0: A VIDEO TO PROMOTE THE INITIATIVE

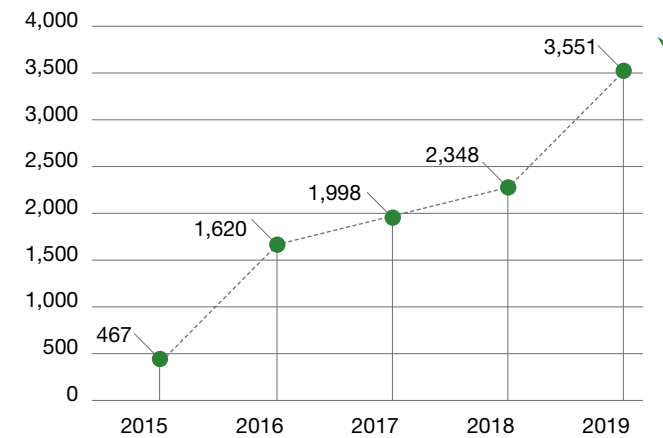
Aéro Montréal has started producing a series of videos promoting its initiatives. The first was produced in 2019, featuring MACH FAB 4.0. It includes images of Leesta, the DCM Group and Abipa. It can be found on Aéro Montréal's YouTube page.



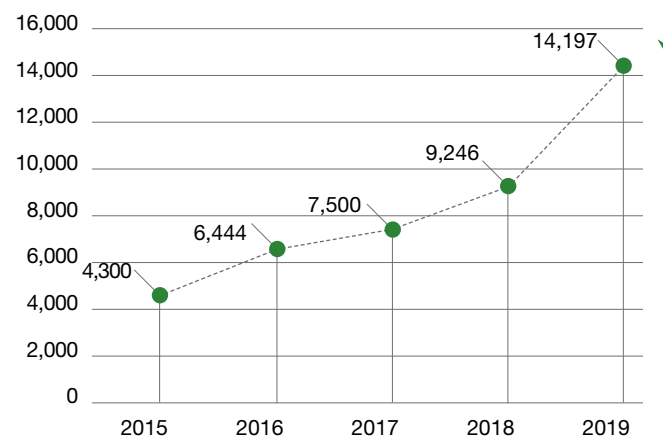
AN EFFECTIVE STRATEGY TO GAIN A BIGGER PRESENCE ON SOCIAL MEDIA

Aéro Montréal now manages nine social media accounts, each targeting different clienteles with a targeted approach. Equipped with an account aggregator and a well-defined publishing strategy, Aéro Montréal is now in a position to increase its penetration of social media. This strategy is already yielding results, with an exceptional increase in the number of our subscribers in 2019.

TWITTER COMMUNITY GROWTH



LINKEDIN COMMUNITY GROWTH



#AEROFUTURE: OBJECTIVE ATTAINED

Rise to the Future (#AEROFUTURE) is a major two-year advertising campaign to promote the industry and training opportunities to potential workers. The campaign was developed by Aéro Montréal, the Comité sectoriel de main-d'oeuvre en aérospatiale, the École des métiers de l'aérospatiale de Montréal, the École nationale d'aérotechnique, and industry partners.

Phases 1 and 2 took place in 2018. They were a great success, as evidenced by the growing number of registrations and attendance at the open houses of aeronautical schools. The website (www.aerofuture.ca) had very high traffic and the Facebook page linked to it reached nearly 20,000 subscribers.



Phase 3, held in the spring of 2019, built on previous activities while adding participation from the City of Mirabel (in addition to Longueuil) and the presence of the campaign at science fairs in the Montréal area. Awards were presented to young scientists. A promotional item was produced. Phase 4, in the fall of 2019, continued the digital campaign.

AÉRO MONTRÉAL COMMUNICATIONS IN 2019

- 13 news releases
- 3,551 Twitter subscribers, a 51% increase over 2018
- 14,197 subscribers on LinkedIn, a 46% increase over 2018
- 18,450 Facebook friends
- 62 media interviews
- Three special sections in the media
- One mission of international journalists
- 128 articles media articles that included a reference to Aéro Montréal

A REVAMPED BOARD OF DIRECTORS AND MANAGEMENT

Aéro Montréal is a non-profit organization (NPO). Its Board of Directors, composed of representatives from all sectors of the aerospace industry, meets four times a year.

The Board of Directors was increased from 30 to 35 members in 2019 in order to adapt its structures to its 2019-2021 strategic plan. It welcomed new prime contractors and integrators, and invited to the table representatives of sectors related to the aerospace industry, namely the Fonds de Solidarité FTQ and Centech.

An electronic vote was held from May 3 to 13, 2019 to select the SME representatives (six seats). Among the 14 compliant nominations received, six directors were elected according to the rules.

The Board's committees also had several achievements this year (see members on page 6).

The Governance Committee, chaired by Claude Baril, prepared and proposed to the Board amendments to the general bylaws required by the new strategic plan, among other things. The Board's skills matrix was updated. Governance training was also provided to Board members by the Collège des administrateurs de sociétés (Université Laval).

The Human Resources Committee, first chaired by Jacques Comtois and then by Patrick Champagne, produced a salary survey and made changes to internal policies.

The Finance and Audit Committee, chaired by Jean Blondin, prepared budgets and carried out internal auditing and monitoring of the organization's finances. The committee reviewed the updating of internal controls to better reflect current practices.

2019 FINANCIAL STATEMENTS

The financial statements prepared by management comply with Canadian accounting standards for not-for-profit organizations. The audit was conducted in accordance with Canadian generally accepted auditing standards.

The controls in place and the audit results enabled auditing firm Deloitte to produce its report on the audited annual financial statements as at December 31, 2019 without reservation.



WORKING GROUP DAYS

The first-ever Working Group Day was held at the Maison des régions in Montréal on January 29. The purpose of this event was to present the new strategic planning and discuss the priorities of the working groups in 2019. The day brought together more than 100 people, all members of Aéro Montréal's working groups. This event will now be held annually.



2019 ANNUAL GENERAL MEETING

Aéro Montréal's Annual General Meeting, which was held on May 17, brought together close to 140 members. In order to highlight the importance of the collaboration between artificial intelligence (AI) players and the aerospace industry, the meeting was held at the Mila, in the heart of Montréal's AI campus. A study, published for the occasion and prepared by the Boston Consulting Group confirmed the potential for close collaboration between the AI and aerospace ecosystems. Treasury Board President, Christian Dubé, reiterated his government's support for our industry.

Directors were appointed during the meeting, including representatives of the six SMEs elected by electronic ballot. The members ratified all of the decisions made by the Board of Directors.



INTERNATIONAL AEROSPACE WEEK – MONTRÉAL 2019

Every year in April, Aéro Montréal members join forces to offer our community a series of activities as part of International Aerospace Week.

The event featured four major events, some 40 prestigious speakers, including several from the AI world, and close to 2,300 participants. Elected officials also attended, including Pierre Fitzgibbon, Québec's Minister of Economy and Innovation; Jean Boulet, Québec's Minister of Labour, Employment and Social Solidarity; the Honourable Navdeep Singh Bains, Canada's Minister of Innovation, Science and Industry and Serge Cormier, then Parliamentary Secretary to the Minister of National Defence. Twenty-two journalists from around the world covered the event. The National Research Council Canada was a strategic partner of the event. Its President, Iain Stewart, and Minister Fitzgibbon spoke at the official opening of the Week.



MOROCCO HONOURED

Morocco was in the spotlight during the 2019 edition. Several meetings facilitating networking were organized in collaboration with the Groupement des industries marocaines aéronautiques et spatiales (GIMAS). Moulay Hafid Elalamy, Moroccan Minister of Industry, Trade, Investment and the Digital Economy, also honoured us with his presence.

The Week was organized in collaboration with the NRC and Norton Rose Fulbright. Airbus Canada and Bombardier were major partners in this year's Defence and Unmanned Aerial Vehicles seminar.

A NEW BOARD CHAIR

The Board of Directors selected Denis Giangi, President of Rolls-Royce Canada, as Board Chair at its June 5 meeting. He succeeds Sylvain Bédard, who retired as Chief Executive Officer of Sonaca Montréal. Mr. Bédard is one of the founding members of Aéro Montréal and we warmly thank him for his significant contributions to our organization.

Denis Giangi has more than 20 years of experience in the aerospace and high technology industry. He is a Chartered Accountant and holds a Bachelor of Commerce and a Graduate Diploma in Public Accountancy from McGill University. He has been a member of the Board of Directors of Aéro Montréal since 2010.





AÉRO MONTRÉAL GOLF CLASSIC AND CYCLING 2019

For more than 20 years, Aéro Montréal members and partners have come together to celebrate and network at this annual event. The 2019 Classic was held on August 26th at the Elm Ridge Country Club. For the past two years, it has also featured a cycling event. This year, more than 300 golfers and cyclists participated and an additional 100 or so people joined in the evening, which is a record. Prestigious door prizes were offered and a portion of the profits were donated to the Air Cadet League of Canada, present at the Classic, to support student perseverance.



DAY ON THE HILL IN QUÉBEC CITY

A delegation of Aéro Montréal members travelled to Québec City in November for a series of meetings, awareness and promotional activities with government representatives in the National Capital. Québec Premier François Legault, ministers of his government and party representatives, as well as several senior civil servants, were informed about the industry's challenges.



A MINISTER WHO'S PRESENT AND ATTENTIVE

In February, the Minister of Economy and Innovation, Pierre Fitzgibbon, took advantage of the announcement of budgets for SA²GE and Aéro21 to meet with the Board of Directors and industry representatives.

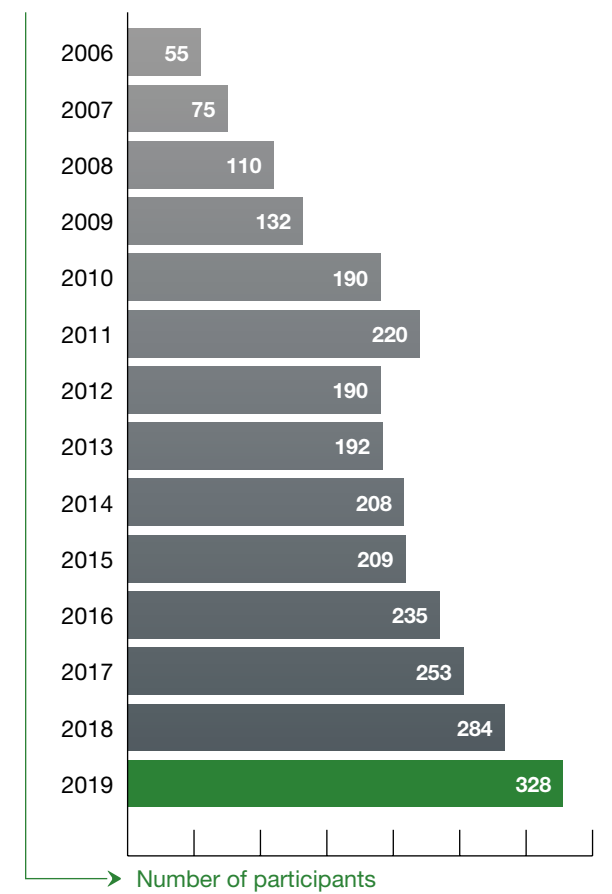


MOBILIZATION AND PARTICIPATION

Aéro Montréal's great strength is the hundreds of women and men who, day after day, participate in its work and activities. This commitment is demonstrated by their involvement in its many entities: board, working groups, committees, events, etc. Their strategic support and valuable collaboration unquestionably contribute to the cluster's dynamism. It is their participation that makes Aéro Montréal's actions so relevant.

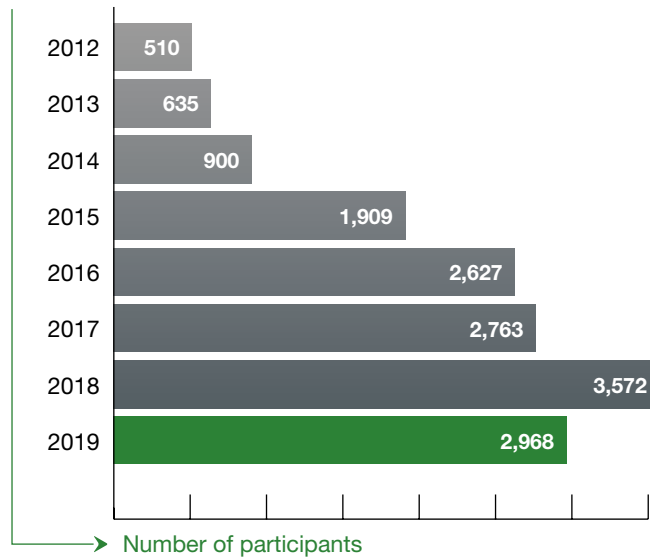
The following tables provide a glimpse of the energy they devote to Aéro Montréal and the growth of our industry.

INDUSTRY MOBILIZATION

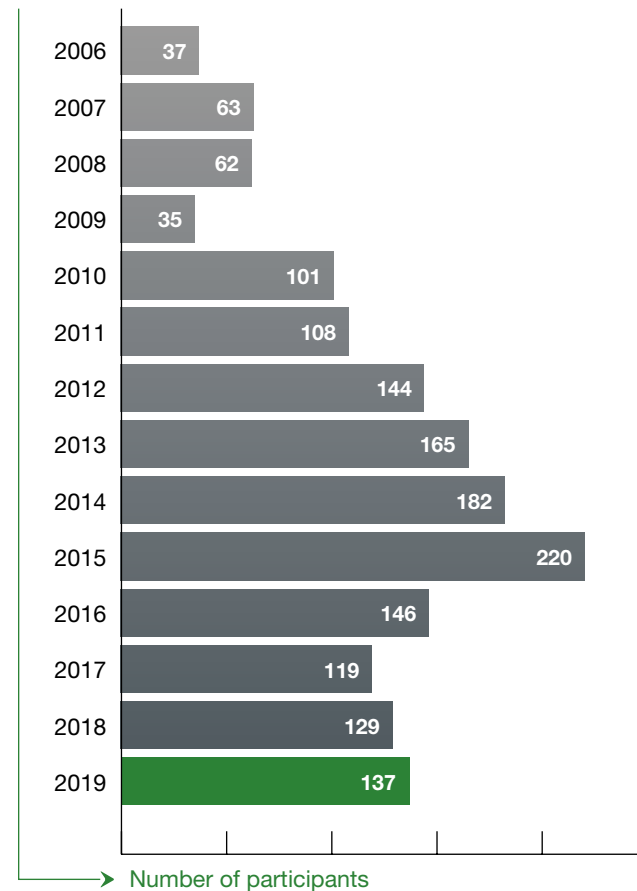


PARTICIPATION IN SME EVENTS

In 2019, nearly 3,000 people participated in our SME events, a six-fold increase over 2012. In 2018, more than 1,000 people attended the Innovation Forum, which contributed to this exceptional involvement.



ATTENDANCE AT THE ANNUAL GENERAL MEETING OF MEMBERS



PROJECTS GENERATED BY THE MACH INITIATIVE

919 improvement projects completed or underway to date:

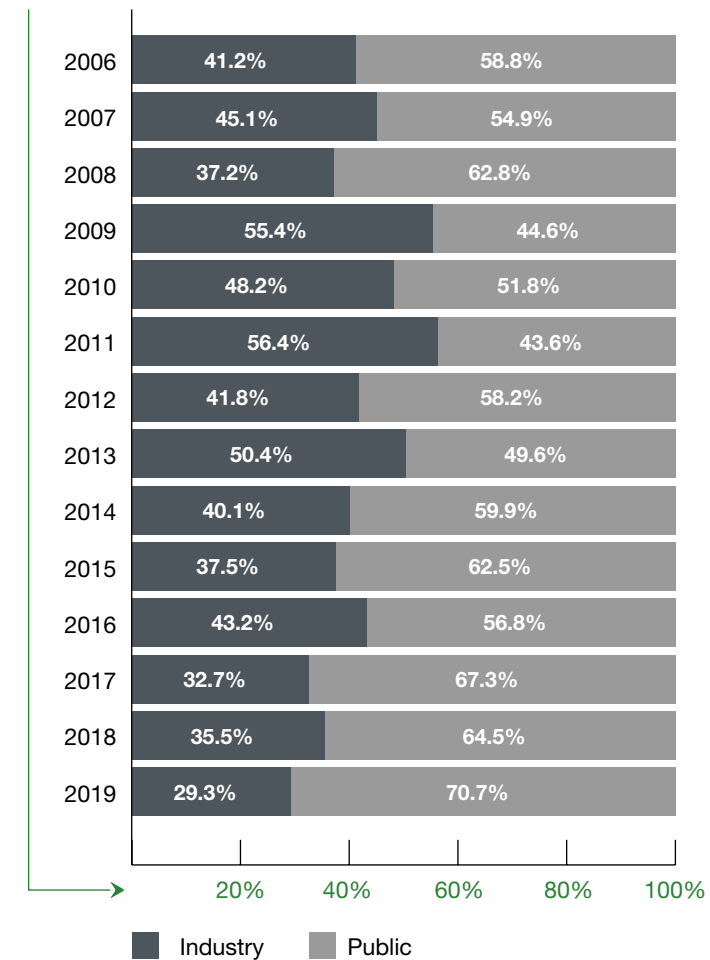
261 projects carried out internally with or without the support of a sponsor

343 projects requiring special expertise

315 skills development projects

DISTRIBUTION OF TOTAL CONTRIBUTIONS FROM THE PUBLIC SECTOR AND INDUSTRY (2006-2019)

In 2019, the private sector's share of total contributions to the cluster was 29.3%. Excluding special projects (MACH, MACH FAB 4.0, Accelerator 360° and StartAéro 360°), the private sector accounted for 36.7% of Aéro Montréal's revenues.

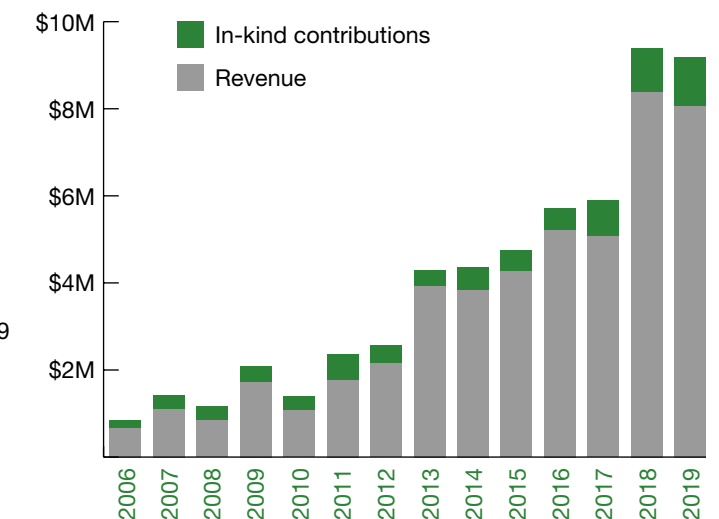


DISTRIBUTION OF THE CONTRIBUTIONS FROM THE PUBLIC SECTOR AND INDUSTRY IN 2019

CONTRIBUTION FROM THE PUBLIC SECTOR IN CASH	\$6,275,955	68.4%
CONTRIBUTION FROM THE PUBLIC SECTOR IN KIND	\$213,550	2.3%
CONTRIBUTION FROM INDUSTRY IN CASH	\$1,782,839	19.4%
CONTRIBUTION FROM INDUSTRY IN KIND	\$907,900	9.9%
TOTAL	\$9,180,243	100%

EVOLUTION OF TOTAL CONTRIBUTIONS (2006-2019)

By combining revenue and in-kind contributions, total support to the cluster remained stable at \$9.18 million in 2019, a slight 2.1% decrease from 2018. Contributions in 2019 were 11 times more than in 2006. In 2019, public and private sector in-kind contributions to the cluster totalled \$1.12 million, a 12.2% increase in one year.



IN-KIND CONTRIBUTIONS BY SECTOR

COMMITTEES	Number of meetings	Duration (in hours)	Number of participants (average)	Number of private-sector participants (average)	Rate (\$/hour/participant)	Subtotal (industry)	Total (industry and public)
Board of Directors	4	8.0	25	18	\$400	\$58,400	\$80,800
Special meeting – Governance training	1	3.5	20	15	\$400	\$21,000	\$28,000
Special meeting – reclassification committee for Bombardier employees	1	1.5	32	27	\$400	\$16,200	\$19,200
Executive Committee	7	3.5	6	6	\$400	\$8,200	\$8,200
Finance and Audit Committee	4	8.0	5	5	\$400	\$16,000	\$16,000
Governance Committee	2	3.0	4	4	\$400	\$4,200	\$4,200
Human Resources Committee	3	4.0	4	4	\$400	\$6,800	\$6,800
Pillars Committee	1	1.5	3	3	\$400	\$1,800	\$1,800
Annual General Meeting (AGM)	1	2.0	137	112	\$200	\$44,800	\$54,800
Working Groups Day	1	6.0	80	64	\$200	\$76,800	\$96,000
Innovation Working Group	3	6.5	16	8	\$200	\$10,400	\$21,900
2020 Aerospace Innovation Forum Pilot Committee	2	3.0	9	6	\$200	\$3,600	\$5,100
DIMLA Project Pilot Committee (4.0 Scale with Hamburg)	3	23.5	12	9	\$200	\$40,700	\$57,900

COMMITTEES	Number of meetings	Duration (in hours)	Number of participants (average)	Number of private-sector participants (average)	Rate (\$/hour/participant)	Subtotal (industry)	Total (industry and public)
Defence and Security Working Group	4	20.0	20	14	\$200	\$55,000	\$79,000
Strategy and Measures Committee	4	8.0	5	4	\$200	\$6,400	\$8,000
Students Committee - Artificial Algorithm Development	0	120.0	4	0	\$20	\$ -	\$9,600
Growth Working Group	5	13.0	11	10	\$200	\$25,200	\$28,200
Accelerator 360 ^o Strategic Committee	2	3.5	10	8	\$200	\$5,300	\$6,700
MRO Working Group	4	8.5	17	16	\$200	\$27,000	\$28,600
Workforce Working Committee	1	1.5	7	6	\$200	\$1,800	\$2,100
Competitiveness Working Committee	2	2.5	6	6	\$200	\$3,000	\$3,000
Regulations Working Committee	1	1.5	7	7	\$200	\$2,100	\$2,100
RPAS Working Group	4	11.0	17	13	\$200	\$29,000	\$37,800
Green and Intelligent Supply Chain Working Group	4	12.0	7	7	\$200	\$15,600	\$15,600
MACH FAB 4.0 Pilot Committee	1	3.0	9	9	\$200	\$5,400	\$5,400
Large Manufacturers Vision	2	6.0	5	5	\$200	\$6,000	\$6,000
REACH Committee	2	4.0	7	7	\$200	\$5,600	\$5,600
MACH Initiative – In-kind engagement of active sponsors*	5	292.3	10	10	\$200	\$367,500	\$367,500

* Notes for the MACH Initiative - In-kind engagement of active sponsors:
The total number of participants is the number of active sponsors.
Duration (in hours) is an estimate of the number of in-kind support hours of sponsors.

The number of hours varies by cohort.
Rate (\$/hour/participant) is the hourly rate of the sponsors.
The total (industry and public) is an estimate of the value of in-kind support of the sponsors.

COMMITTEES	Number of meetings	Duration (in hours)	Number of participants (average)	Number of private-sector participants (average)	Rate (\$/hour/participant)	Subtotal (industry)	Total (industry and public)
Human Resources Working Group	4	10.5	20	11	\$200	\$24,000	\$42,900
Strategic Planning Committee	1	2.5	6	4	\$200	\$2,000	\$3,000
Interns Committee	2	3.0	4	1	\$200	\$400	\$2,800
Skills 4.0 Committee	1	1.0	6	3	\$200	\$600	\$1,200
Héritage Committee	4	8.0	3	2	\$200	\$3,600	\$4,800
Concertation Table - Bombardier employees reclassification	3	3.0	4	3	\$200	\$2,000	\$2,600
Image, Visibility and Marketing Committee	1	2.0	10	10	\$200	\$4,000	\$4,000
Rise to the Future Promotion Committee	3	8.0	7	2	\$200	\$3,900	\$12,100
Regroupement Relève Aéro Montréal (RRAM) Committee							
RRAM Meetings	12	19.8	12		\$20	\$ -	\$4,740
Roundtables and discovery workshops	14	25.8	20		\$20	\$ -	\$10,300
Succession perception study	4	4.8	6		\$20	\$ -	\$570
Participation in HR Working Group	3	6.5	2		\$20	\$ -	\$260
Events - Preparation and involvement	12	52.0	17		\$20	\$ -	\$21,880
Finance Roundtable	1	2.0	11	9	\$200	\$3,600	\$4,400
TOTAL		730				\$907,900	\$1,121,450



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President



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Supply Chain



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Growth



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* Members of the Director committee

MAJOR EVENTS IN 2019

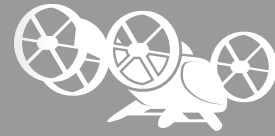
DATE	EVENT
JANUARY	
28	Accelerator 360° Training: Market development
29	Working Group Day
FEBRUARY	
7	Mat'Inno: Aircraft of the future conference*
10-12	MRO Middle East trade show*
11-14	Mission Aéro Montréal - PNAAC Conference 2019
22	SA ² GE Training: Ecodesign, innovation driver for organizations
27	StartAéro 360°: Launch and information meetings
25-7 March	Export Québec : Trade mission to Mexico*
28	Accelerator 360° training: Finance
MARCH	
8	Diversity and Inclusion Forum – International Women's Day
13	AQTA MRO Conference
13	Industry Day: LMCO – L3Harris Technologies
31-5 April	MEI: Mission to Hannover Messe
APRIL	
2-5	Aircraft Interiors Expo, Hamburg
4	CAVI: Meeting with OEMs
9-12	Export Québec: MRO Americas trade show, Atlanta*
15	IAW2019: Seminar on Defence and Unmanned Aerial Vehicles
16	IAW2019: Global Supply Chain Summit
17-18	IAW2019: Aéro Montréal (Startups Village)
17	IAW2019: Aéro Montréal and GIFAS international partnership cocktail
23	Industry Day: Airbus
29-2 May	AUVSI-Xponential, Chicago

DATE	EVENT
MAY	
14-16	CASI: Aero19 - Canada's leading aeronautics conference*
17	Annual General Meeting
28	Accelerator 360°: Launch of 2 nd cohort
29-30	CANSEC Show*
30	CAVI: Orientation committee under MACH FAB 4.0
JUNE	
1-2	RRAM: AéroSalon 2019, Saint-Hubert
3-5	Movin'On World Summit on Sustainable Mobility
4	Launch of StartAéro 360°
12	Accelerator 360°: Meeting of cohorts 1 and 2
12	Growth Working Group: Cercle de partage final meeting
17	Le Bourget: Launch cocktail
18	Le Bourget: Accelerator 360° breakfast with the GIFAS
18	Le Bourget: Conference on StartAéro 360°
19	Le Bourget: Aéro Montréal international dinner
20	Le Bourget : Conference on Accelerator 360°
JULY	
4	MACH Training: Digitization of day-to-day plant operations
AUGUST	
22	Women in Aerospace, Montréal*
26	Aéro Montréal Annual Golf Classic and Cycling
26-27	De Havilland and MHICA trade mission
28	StartAéro 360°: Information day

* Events organized by our industry partners

DATE	EVENT
SEPTEMBER	
8	Mission to Wichita, Kansas
13	StartAéro 360° training: Ecosystem and B2B pitch
13	Accelerator 360° breakfast: Establishing in France
17	Italian Chamber of Commerce in Canada - AI Presentation
19	Seminar: Andalusia Aerospace Industry – Investing in Spain
19	Launch of Centech aerospace cohort
19	RRAM roundtable on market development in aerospace
23	IACO Innovation Fair 2019
25-26	UAS TechDemo, Alma
24-26	Export Québec: MRO Mission in Asia-Pacific/Aero Engines*
26	Manufactured in Vermont trade show and signing of agreement on extending the Vermont-Québec corridor to Connecticut
26	AIAC: Charting a New Course, pre-federal election meeting with political parties
30-3 Oct.	GIFAS Mission in Western Canada*
OCTOBER	
4	Accelerator 360° breakfast: Integration after acquisition
8-10	Export Québec: Mission to the Aero and Auto Advanced Supplier Summit 2019
10	MACH training: Duchesne Formation
16	ÉNA Colloque aérotechnique*
16	Consultation on REACH regulations
19-20	Recruitment mission to Toulouse with Montréal International
21	Aéro21: Conference on the industrialisation of innovation for SMEs
23-24	CCAA Annual Labour Market Strategy Event*
25	Accelerator 360° strategic committee
25	RRAM SME visit: M1 Composites Technology
29-30	SDQuébec: Training on the Canadian defence market

29-31	Aerospace Meetings: Casablanca*
29	Training: Immigration demystified
29	Aerospace Recruitment with I choose Montréal
30-1 Nov.	Unmanned Canada show, Ottawa
NOVEMBER	
4-5	SDQuébec: Training on the American defence market
5	Industry Day: Babcock
5-6	Aviation Forum Munich
6	Innovation 4.0 Forum
7	Industry Day: CAE
9-10	IATA Drones Innovation Weekend*
12-13	Canadian Aerospace Summit 2019
14	Seminar on managing intellectual property
15	Training: Immigration demystified
16-21	Export Québec: Mission to Dubai airshow*
20	RRAM roundtable: Investigations and reports on air transport safety
18-20	ATAQ and AQTA*
21	La Grande Corvée de l'emploi*
24-29	Export Québec: Mission to Italy
27	Day of meetings at the Québec National Assembly
28	Training on immigration: Impact study expenses (EIMT) and certificat d'acceptation du Québec (CAQ)
29	Activity to learn about aerospace trades
DECEMBER	
2	4.0 Orientation Day and Economic Trends 2020, and signature of MACH-Atlantic agreement with ACADA
9	Accelerator 360°: End of year meeting
9	Training on immigration: Temporary work permit
12	StartAéro 360° : Intellectual property management training
13	Drone week, Amsterdam



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OF AEROSPACE
INNOVATION**



Québec 

Canada 

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