



TOWARD NEW HORIZONS

2013 *Activity Report*

AÉRO 
MONTREAL

3rd LARGEST GLOBAL AEROSPACE CAPITAL

12.05
BILLION

12.05 BILLION
IN SALES (\$)

70%
INVESTMENTS

70% OF CANADIAN
INVESTMENTS IN R&D

204
COMPANIES

204 COMPANIES,
INCLUDING 4 OEMS,
10 EQUIPMENT
MANUFACTURERS
AND 190 SPECIALIZED
SUPPLIERS

55%
PRODUCTION

55% OF TOTAL
CANADIAN
PRODUCTION

43,500
WORKERS

43,500 HIGHLY
SKILLED WORKERS

50%
JOBS

50% OF JOBS IN THE
CANADIAN INDUSTRY

AÉRO MONTRÉAL

A unique tool created by members of Québec's aerospace industry, Aéro Montréal, the Québec aerospace cluster, groups all the major decision makers including companies, educational and research institutions, associations and unions.

By promoting concerted actions and mobilizing industry players around common goals, Aéro Montréal fosters the competitiveness, growth and expansion of the aerospace sector in Canada and abroad, making the Greater Montreal region a major international aerospace hub.

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Stability

In recent years, our industry has weathered turbulence with strength and resilience. We are encouraged today to see the first signs of global growth.

The International Air Transport Association (IATA) recently announced that air passenger traffic rose to a record 3.1 billion in 2013. IATA also indicates that airlines expect passenger volume to increase by 31% by 2017, to 3.9 billion. At this rate, the order books of major manufacturers should benefit considerably.

During the past year, the aerospace industry stood out with the announcement of major contracts and investments in research and development, the establishment of strategic alliances and the implementation of leading-edge manufacturing technologies that bode well for the future. We also witnessed an historic moment with the first flight of the CSeries regional aircraft. The Québec aerospace industry has devoted its efforts to develop a world-class expertise, right here, in order to strengthen the competitive position of the entire value chain of numerous SMEs.

We must of course remain pragmatic and vigilant regarding the challenges facing our industry. Markets are continuing to globalize more than ever, and competition is intensifying. In this context, I am convinced that the Québec aerospace industry made the right choice, seven years ago, to mobilize under the leadership of Aéro Montréal. Major projects implemented since the establishment of Québec's aerospace cluster have produced highly convincing results and enabled us to optimize the performance of our supply chain, to develop new leading-edge technologies and to respond to major challenges related to succession. In addition, Aéro Montréal has concluded cooperation agreements with a number of international clusters, promoting business opportunities for our companies with international partners.

I have agreed to chair Aéro Montréal's Board of Directors, succeeding Gilles Labbé, President and Chief Executive Officer of Héroux-Devtek, whom I thank warmly for his outstanding leadership and his many accomplishments.

I would also like to acknowledge the professionalism and dynamism of the Aéro Montréal team, which ensure the effective implementation of the cluster's strategies, the results of which benefit all our members. I am honoured to be joining the team and contributing to the advancement of our industry and enhancing its positioning in both Québec and Canada as well as the international stage. As we celebrate in 2014 the 100th anniversary of the first commercial flight, I am convinced that the aerospace sector will continue to grow and be a source of pride for thousands of Quebecers.

MESSAGE FROM THE CHAIR



MARIA DELLA POSTA

Chair of the Board

Aéro Montréal

Senior Vice President, Sales and Marketing

Pratt & Whitney Canada

Confidence



MESSAGE FROM THE PRESIDENT



SUZANNE M. BENOÎT

President

Aéro Montréal

I am particularly proud of Aéro Montréal's accomplishments in 2013, a pivotal year in the evolution of our organization as the entire industry demonstrated renewed optimism in the face of recovering markets.

The merger of the Québec Aerospace Association with Aéro Montréal has resulted in an optimal consolidation of our resources and greatly benefited local companies.

I want to underline the enthusiasm with which all our Working Groups have responded to the "new" Aéro Montréal. They have been able to increase structuring projects with a view to improving the performance and competitiveness of our industry and strengthening its status as a leading global aeronautical hub.

Given the importance of attracting and retaining highly qualified personnel, the Human Resources Working Group is focusing on implementing priority projects set out in its 2012 White Paper. These will lead to a more in-depth understanding of the essential skills that organizations need as well as of intergenerational knowledge transfer mechanisms.

The MACH Initiative began its third year of operation. The impressive results of the first cohort confirm the pertinence of this unifying program designed to develop the performance of the supply chain. A third cohort was launched with 10 new suppliers and four sponsors, all ready to meet the challenges of the MACH Excellence Framework.

The Markets Development – SMEs Working Group, meanwhile, developed its own vision and mission statement. This will allow it to respond more effectively to the marketing challenges specific to SMEs, in addition to ensuring their growing presence worldwide. Networking events and enhancement of skills have allowed for greater participation and supported the business development efforts of SMEs.

The Innovation Working Group marked another structuring milestone in the evolution of Québec aerospace innovation by submitting a brief to the government as part of consultations on Québec's industrial policy. The brief's recommendations aim to establish a support structure for companies to increase the use of advanced manufacturing in their production process.

In a similar vein, in December Aéro Montréal organized the 4th edition of the Aerospace Innovation Forum, bringing together more than 120 expert speakers and 1,100 participants and researchers from the Canadian and international industry.

Finally, the Branding and Promotion Working Group strengthened Aéro Montréal's presence and credibility in the community and on the public stage. In addition to numerous media interviews, we were able to promote the dynamism of the sector by collaborating, for a fourth consecutive year, in the publication of five special supplements in the daily La Presse and the weekly Les Affaires. Furthermore, the Working Group initiated work on its proposed digital ecosystem that aims to raise public awareness of the industry and increase its appeal among young people.

I would like to conclude by thanking all members of Aéro Montréal and our funders for their unwavering support for our industry. I would also like to acknowledge the invaluable daily support provided by my team, which has worked tirelessly to launch and complete impactful measures that benefit our entire industry.

BENEFITS OF THE AEROSPACE REVIEW

Throughout the year, the Government of Canada responded positively to the recommendations of the Aerospace Review tabled by the Honourable David Emerson in 2012, including measures specific to the industry stemming from its 2013 Economic Action Plan.

The measures announced directly reflect the main action priorities laid out by cluster members during the review's consultations, in which Aéro Montréal took part. This underscores the strategic importance of the sector for the Canadian economy.

Several of these measures are aligned with initiatives implemented by stakeholders in Québec's aerospace cluster over the last 10 years, such as the greener aircraft (SA²GE) catalyst project, the Consortium for Research and Innovation in Aerospace in Québec (CRIAQ) and Aéro Montréal's MACH Initiative.

GOVERNMENT OF CANADA MEASURES ANNOUNCED IN 2013

Investment of \$1 billion over five years as part of the Strategic | Aerospace and Defence Initiative (SADI).

Commitment to review how the SADI program is administered and operated.

Launch of the Aerospace Technology Demonstration Program with a budget of \$110 million over four years, starting in 2014–2015, and \$55 million per year thereafter.

Creation of a national network for aerospace research and collaboration based on the CRIAQ model.

Review of the rate of recovering the costs of aircraft safety certification to ensure that the program is able to meet growing demand in this area.

Commitment to create economic opportunities linked to the development of key industrial capabilities as part of military procurement programs.

Implementation of incentives for small businesses, such as tax relief on new machinery and equipment.

Commitment to double support for the Space Technologies Development Program.

Establishment of a space advisory board composed of leaders from the industry and headed by the President of the Canadian Space Agency (CSA).

Commitment to ensure that new procurement activities in the space sector are consistent with government priorities and the principles set out in the report on the operation of military procurement presented by Tom Jenkins in 2012.

Commitment to continue to help the industry meet market access and skills development challenges.

Study opportunities available to the private sector to support CSA activities.

Launch, in 2014, of a Canadian space policy framework that will guide the strategic objectives and the approach of the Government of Canada's space activities.

Aéro Montréal welcomes the government's vision of making aerospace a priority.

Given this promising sector's importance for Québec and Canada, it is clear that the government's support of it through the establishment of effective and well-designed programs will help ensure the long-term growth of the industry and the creation of quality jobs for Canadians.





WORKING GROUPS:

**WORKING
TO IMPLEMENT
STRUCTURING
PROJECTS THAT WILL
BENEFIT QUÉBEC'S
AEROSPACE SECTOR.**



**TOGETHER,
WE SHARE THE
SAME PASSION
FOR AVIATION!**

NANCY GERMAN

President, Branding and Promotion Working Group



Passion

NANCY GERMAN

President, Branding and Promotion Working Group

Vice President, Communications

Pratt & Whitney Canada

The solid and enviable reputation enjoyed by our sector is a source of pride for the thousands of women and men who work in it every day.

**MEMBERS OF
THE WORKING GROUP**

Nathalie Bourque
CAE Inc.

Hélène V. Gagnon
Bombardier Aerospace

Josée Gaulin
L-3 MAS

Alain Legault
Collège Édouard-Montpetit

Hélène Séguinotte
SAFRAN

Marie St-Aubin
Bell Helicopter Textron Canada

Serge Tremblay
CAMAQ

OBSERVER

Martin Aubé
MFEQ

For seven years now, the Branding and Promotion Working Group has been seeking to increase the influence of the aerospace industry here in Québec and Canada as well as globally. The solid and enviable reputation enjoyed by our sector is a source of pride for the thousands of women and men who work in it every day. Together, they share the same passion for aviation!

During the past year, our team has collaborated closely with all the Working Groups to advance Aéro Montréal's strategic plan. We put in place innovative strategies to promote the industrial capabilities and expertise of our companies, increase recognition of SMEs and spark a passion for aerospace among young people.

I would like to thank and acknowledge the significant contribution of all members of the Working Group. Thanks to everyone's expertise and commitment, we have fostered the sustainable business development of our companies and strengthened the leadership and reputation of our industry internationally.

Working Group Achievements

DIGITAL ECOSYSTEM

In order to increase public understanding of and appreciation for the aerospace sector and to attract young people to make it a career one day, the Branding and Promotion Working Group worked on the implementation of the second phase of the digital marketing strategy established in 2012.

This digital ecosystem project, funded in collaboration with Emploi-Québec, the Secrétariat à la région métropolitaine, the Montreal Metropolitan Community and the private sector, will be officially launched in 2014. Eventually, it will include a web portal, a Facebook page, a Twitter account, a YouTube link and other digital applications, providing information on the industry and its companies, training opportunities, educational institutions, career opportunities and events open to the public. It will also offer a special forum for the general public and stakeholders in the Québec aerospace industry through videos and testimonials from employees, among others.

To help establish the content grid and the “virtual advisor” production tool, the Working Group established two subcommittees composed of experts in web communications, training and human resources. Members are continuing to

collaborate in the implementation of the ecosystem by collecting informative material and available visuals and videos while ensuring the relevance of the information to target audiences.

ANNUAL GENERAL MEETING

In April 2013, Aéro Montréal held its AGM. Some 165 participants came together at the McGill Faculty Club to hear about the positive results of actions taken in 2012 by Québec’s aerospace cluster. In the presence of Nicolas Marceau, Québec Minister of Finance and Economy, and Rudy Demotte, Minister-President of Wallonia and the Federation Wallonia-Brussels, a second collaboration agreement with Skywin Wallonia, the aeronautics and space cluster, was ratified with a view to evaluating the potential implementation of the deployment of the MACH Initiative in Wallonia.

The media were invited to a press conference formalizing this signing, and several in-depth articles were published after the event.

INTERNATIONAL COLLABORATION AGREEMENTS SIGNED

In 2013, four new international collaboration agreements were added to Aéro Montréal’s inter-cluster network, increasing the

influence and reputation of the cluster and its members worldwide. Aéro Montréal signed agreements with the Federación Mexicana de la Industria Aeroespacial (FEMIA) during a mission to Mexico and with the Aerospace Cluster in Rhône-Alpes, at the International Paris Air Show.

During the 2013 Aerospace Innovation Forum in December, Aéro Montréal also formalized its collaboration with the Vermont Aerospace & Aviation Association and the New Hampshire Aerospace and Defense Export Consortium (NHADEC). These agreements are part of a broader framework to create a Québec–New England Corridor which will eventually include other states with aerospace industries whose supply chains are often interconnected with that of Québec, such as Massachusetts, Connecticut, Maine, Rhode Island and New York.

MEDIA COVERAGE OF THE CLUSTER

In 2013, Aéro Montréal actively promoted and represented the cluster and its initiatives at local and international forums.

Aéro Montréal was invited on several occasions to speak to special groups at local and international events such as: the Institute of Industrial Engineering Conference at



Concordia University, the Strategic Forum of Industrial Clusters and AEROMART Montréal. Aéro Montréal representatives spoke about the Québec aerospace industry, its economic importance for Québec and Canada, as well as the positive impacts of the cluster's structural actions for the industry.

Among other things, Aéro Montréal supported the Canadian government's lobbying efforts to keep the ICAO headquarters in Montréal and promoted its members' newsworthy activities. It gave 38 interviews in 2013 and issued 20 press releases that resulted in the publication of 248 articles divided as follows: 114 in the Québec press, 24 in the national press and 47 in the international press. As part of the Aerospace Innovation Forum, Aéro Montréal also hosted a delegation of seven international journalists. Through these media relations efforts, media coverage generated by the cluster in 2013 saw a 44% increase compared to 2012.

Finally, Aéro Montréal collaborated on the content of five special supplements about aerospace published in La Presse and Les Affaires magazine that focused on the next generation of workers, the supply chain and innovation.

SOCIAL MEDIA STRATEGY

To ensure its presence on social media and to reach wider and more mobile audiences, Aéro Montréal developed a social media strategy and implemented its virtual community. The community on the Twitter account quickly increased to 681 followers and to 500 followers on LinkedIn.

AEROSPACE DAY IN QUÉBEC CITY

In May, Aéro Montréal held an Aerospace Day in Québec City to rally all stakeholders around a common mission, namely the advancement and recognition of Québec's aerospace sector. Several speakers took part in this day of meetings and conferences, which was a great success. The chief executives of the aerospace sector in Québec highlighted the extent of the industry's economic impacts which while heavily concentrated in the Montréal area, creates wealth for all Quebecers and helps to bolster the influence of Québec internationally.

Maria Della Posta, Chair of the Board of Directors of Aéro Montréal and Senior Vice President, Sales and Marketing, at Pratt & Whitney Canada, took advantage of a conference on enhancing the competitiveness of industry through

automation, organized in collaboration with Québec International, to talk about how to maintain global leadership in a competitive environment.

This activity was also an opportunity to meet the caucuses of the various parties represented in the National Assembly as well as elected officials and senior civil servants from economic departments to inform them about the issues and challenges of our industry.

To end the day, Québec Premier Pauline Marois, as well as several ministers, took part in an activity with many representatives present in Québec City for this major industry event.



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1. Signature with Vermont Aerospace & Aviation Association and NHADEC
2. Members of the US delegation at the 2013 Aerospace Innovation Forum
3. Minister Nicolas Marceau at the 2013 AGM
4. 2013 AGM
5. 2013 AGM
6. Strategic Forum of Industrial Clusters

WORKING GROUP

Branding and Promotion

2014 DIRECTORY

In December, Aéro Montréal launched the third edition of the Québec aerospace cluster directory. With over 300 entries, this reference tool ensures the reputation and visibility of the cluster on the national and international scene.

Featuring a new graphic design, the directory is an essential document that supports the marketing efforts of Québec companies among potential customers during local and international missions. This business directory also promotes Québec's industrial capacity in addition to showcasing the many players in the cluster such as associations, institutions, schools and research centres.

The directory, produced with the support and expertise of Sous-Traitance Industrielle Québec (STIQ), is offered in a printed version and online on Aéro Montréal's website. It is distributed by Québec delegations abroad and is available in Canadian embassies and at major events.

MOBILE APPLICATION

As part of the Aerospace Innovation Forum, Aéro Montréal, in collaboration with its partner CGI, launched an innovative mobile application to maximize business spinoffs arising from this international event.

In addition to being provided with an electronic version of the Forum program, participants were able to view relevant content about the aerospace industry in Québec and information on speakers, as well as gain access to their personalized agendas of B2B business meetings.

The mobile application was a resounding success with participants. More than 50% downloaded it, for a total of 8,100 open sessions. The mobile application will evolve in 2014, since a second phase is currently under production. It will feature the cluster's directory, a list of events organized by Aéro Montréal and a news feed on the Québec aerospace industry.



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- 7. Mobile application
- 8. 2014 directory
- 9. Special supplements



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Collaboration

PATRICK CHAMPAGNE

President, Innovation Working Group
Vice President, Cockpits and Systems Integration
Esterline CMC Electronics

As a global leader in aerospace, Québec needs to intensify its efforts to maintain its position, especially with increasing competition from emerging economies.

MEMBERS OF THE WORKING GROUP

Alain Aubertin
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Nihad Ben Salah
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OBSERVERS

Dominique Leroy
Industry Canada

Normand Raymond
MFEQ

As a global leader in aerospace, Québec needs to intensify its efforts to maintain its position, especially with increasing competition from emerging economies. Aware of this challenge, members of the Innovation Working Group have chosen collaboration as the best way to spur innovation of all kinds and leverage the industry's strategies and projects. By doing this, they aim to facilitate the growth of companies and ensure their integration on future aircraft platforms.

This year, the group played various roles. It fostered cooperation among players to ensure prioritization of the industry's major concerns in the area of R&D. In addition, it promoted a consistent approach in cluster members' actions to optimize the return on public and private investments in R&D. As a result, the Working Group supported many structuring projects related to research infrastructures, sustainable development, resource sharing, Québec's industrial policy and the National Research and Innovation Policy (NRIP).

As president of the Innovation Working Group, I am proud of how our cluster and its members have mobilized around a crucial issue, namely the development of our capacity for innovation. It is by continuing our efforts and accelerating the implementation of catalyst projects in innovation that our industry will reach new horizons.

Working Group Achievements

QUÉBEC INDUSTRIAL POLICY

Aéro Montréal's Innovation Working Group wrote a brief as part of the rigorous consultation exercise on Québec's industrial policy conducted by the Government of Québec. Submitted in February, the brief summarizes the benefits of new automation and advanced manufacturing practices for aerospace companies and stresses the importance for the government to help SMEs to start this shift to ensure their growth and competitiveness internationally.

Entitled **“Implementing, in the short term, the new advanced green manufacturing practices in Québec's aerospace industry”** this brief proposes two recommendations aimed at developing a base of subcontracting SMEs that is more productive, with new production capacities and distinctive capabilities better aligned with the needs of global prime contractors.

Recommendations:

- 1 Continue funding company projects that have already made the shift to advanced manufacturing.
- 2 Develop a Québec expertise in the planning, implementation and operation of projects to integrate automation and digital technologies in companies that have not yet made the shift to advanced manufacturing.
 - Promote the investment decision;
 - Implement new processes and equipment;
 - Provide production support;
 - Develop a strong, competent network of companies skilled in digital technologies and advanced manufacturing.

These recommendations will complement provisions of provincial and federal programs already in place. The program will also foster the acquisition of technologies and local Québec expertise.

IMPACT OF BRIEFS ON THE NATIONAL RESEARCH AND INNOVATION POLICY (NRIP) AND QUÉBEC'S INDUSTRIAL POLICY

In October, the government announced its Québec Economic Policy and ensuing strategic initiatives. Three of these initiatives suggested promising projects for the aerospace industry.

Many actions and measures proposed in the Québec Industrial policy and the NRIP, as well as the international trade development plan, respond directly to the recommendations made in the briefs submitted by the cluster during public consultations that Aéro Montréal had taken part in since 2012.

First, Québec will support Phase 2 of the greener aircraft catalyst project. Confirmation of the \$40 million investment in public funding for this project will leverage the efforts initiated in the SA²GE – Phase 1 project and promote the transfer of valuable technology toward the commercialization of innovative products.

In addition, the increase to 3% of GDP of the investment target devoted to research as well as the extension of the



NRIP's base budget over five years will increase the stability and sustainability of innovative projects. This will facilitate the mobilization of prime contractors, suppliers, SMEs, research centres and universities in developing new technologies.

The government will also give the industry the means to increase its productivity and competitiveness globally by supporting automation and robotics projects related to manufacturing processes of Québec SMEs.

In addition, Québec companies' export projects will be prioritized. With contributions of \$82 million by 2017 to help SMEs in strategic sectors to increase their presence and competitiveness in foreign markets, the government is enabling companies to consolidate their position internationally and integrate themselves into supply chains.

Finally, Aéro Montréal is honoured to have been invited to sit with other organizations on the advisory committee of industry partners by Elaine Zakaïb, Minister for Industrial Policy and the Québec Economic Development Bank. This committee was established to ensure the consistent application of government measures and actions in alignment with the needs of various industrial sectors.

INDUSTRIAL NETWORK FOR THE ENVIRONMENTAL MANAGEMENT OF END-OF-LIFE AIRCRAFT

Following the submission of its report in 2012, Aéro Montréal developed a financial model to attract investors and partners in the implementation of the proposed industrial hub for the ecological dismantling of end-of-life aircraft on the site of Montréal-Mirabel International Airport.

This industrial hub aims to optimize the equipment and materials aboard end-of-life aircraft through reuse, refurbishment, recycling and resale, with a target of more than 95% of aircraft in Québec by 2020.

INVENTORY OF INFRASTRUCTURES AND EQUIPMENT AVAILABLE FOR COLLABORATIVE RESEARCH

The Innovation Working Group joined CRIAQ in establishing an inventory of infrastructures and equipment available for collaborative research. This project aims to maximize the use of existing research equipment and infrastructure and to increase the level of R&D by SMEs by making available equipment at lower cost and thus facilitating the transfer of technology towards the commercialization of innovative products.

The inventory, completed by CRIAQ during the year, is now available in electronic format. The interactive Web portal offers a comprehensive list of available research infrastructures and equipment and allows for a search by keywords, thereby promoting the maximum utilization of materiel.

PARC CATALYST PROJECT

The PARC (Automated Resource Sharing in Communities) catalyst project is a multi-sectoral initiative led by JMJ Aerospace in partnership with Momentum Technologies supported by Aéro Montréal and CRIAQ. It also involved the collaboration of Aluminerie Alouette. The PARC project is part of the NRIP and aims to try out new working methods and industrial collaborations. It also seeks to systematize the sharing of innovative practices and operate these on a transactional technology platform. PARC seeks to mitigate the cyclical effects suffered by industries by inviting organizations to share their resources to ensure job security for workers and better retain and expand their knowledge.

CRÉER PROJECT

Part of the PARC catalyst project, CRÉER (Collaboration of Resources, Equipment and Research Expertise) targets the systematization of sharing advanced research equipment and infrastructure to facilitate their access and optimize their use. This sub-project will address the challenges of characterizing resources, the management of intellectual property, and collective balancing. CRÉER is an exploratory project of CRIAQ which brings together a university research team led by École Polytechnique in collaboration with McGill University, HEC (Mosaic) and ÉTS. Aéro Montréal is supporting this important project, which is being coordinated by JMJ Aerospace in close collaboration with Bombardier Aerospace, Pratt & Whitney Canada and Bell Helicopter Textron Canada.



1. Québec industrial policy brief
2. Management of end-of-life aircraft project
Source: Avianor
3. Management of end-of-life aircraft project
Source: Avianor

Aerospace Innovation Forum 2013

More than 1,100 professionals from the aerospace sector attended the fourth edition of the Aerospace Innovation Forum, organized by Aéro Montréal in collaboration with CRIAQ from December 2 to 4.

With the theme **“Innovation Powers Sustainability for the Aerospace Industry,”** this event, the most important of its kind in Canada, brought together engineers, researchers and procurement professionals from companies, research centres, associations and government agencies.

More than 120 speakers, including the Québec Minister of Finance and the Economy and the Minister of Industry of Canada, shared their knowledge on topics such as the latest technological trends in the industry and international best practices in design, manufacturing, operations and end-of-life management of aerospace products.

Presentations were also given by major companies such as Boeing, Airbus, Bombardier Aerospace, Dassault Aviation, Pratt & Whitney, Kelly Aviation Center, GE Aviation, Héroux-Devtek, Esterline CMC

Electronics, Finmeccannica and SAFRAN. The Forum attracted many foreign delegations from 15 countries.

In addition to plenary sessions and workshops over two days, participants could also visit the exhibition where more than 80 companies presented their latest innovations, an increase of 25% compared to 2011. Several also took advantage of business development opportunities created by B2B technology meetings and two networking cocktails. More than 1,000 B2B meetings between prime contractors, Tier-1 companies and suppliers, as well as among participants, also took place during the Forum, enabling players to have strategic meetings and learn about promising business opportunities.

The first dinner conference, presented by Guy Hachey, President and Chief Operating Officer of Bombardier Aerospace, was a full house. Mr. Hachey presented Bombardier Aerospace’s innovation strategy and spoke about the importance of the CSeries program. Joseph Anselmo, editor of Aviation Week, was the moderator of this prestigious

conference. Following the conference, the two men took a moment to discuss the results of the first flight of the FTV1 aircraft as well as the next steps for the company in the CSeries program.

This gathering of innovation specialists generated considerable interest among the media, both national and international. Some 27 journalists attended the conference, including seven journalists from the international press. The Forum produced more than 35 articles in local, national and international media. Throughout the Forum, a film crew was present to capture the highlights of the event. A video can be viewed on Aéro Montréal’s website.

A White Paper summarizing the presentations and recommendations will be released during Aéro Montréal’s AGM in May 2014.



A 3rd DAY ON TRAINING AND FINANCING

To encourage Québec companies to put innovation at the heart of their critical activities, two new components were discussed in parallel this year.

Aéro Formation

Under the theme **“For a world-class labour force,”** the seminar presented innovative tools to ensure the continuous training of skilled workers, technicians, engineers and professionals in the aerospace industry.

As part of this event, organized in collaboration with the Conseil emploi métropole and Emploi-Québec, Aéro Montréal announced the launch of a Québec chapter of Women in Aerospace (WIA). Bringing together many women from the industry, the WIA-Québec chapter will create a local network and propose a range of events, social activities and training in addition to those provided by WIA Canada. A video can be viewed on the website of Aéro Montréal.

Aéro Financing

Under the theme **“Financing: accelerant for innovative companies,”** the Aéro Financing seminar, organized in collaboration with the Montréal Finance cluster, presented the many financial services and strategic guidance resources available to aerospace companies. Funding for research, technology demonstrations, infrastructures and operations, as well as support for the expansion and the commercialization of advanced technologies, were highlights of this popular event.

On this occasion, Aéro Montréal developed a “dragon’s den.” Three innovative SMEs in Québec presented their project to a panel of financial “dragons.” The panel then announced their interest in the projects. A video can be viewed on Aéro Montréal’s website.



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1. Exhibition hall
2. Maria Della Posta, Senior Vice President, Sales and Marketing, Pratt & Whitney Canada
3. Guy Hachey, President and Chief Operating Officer, Bombardier Aerospace
4. The Honourable James Moore
5. Plenary session
6. Cocktail Pratt & Whitney Canada

**IT IS BY JOINING
OUR FORCES
THAT WE WILL
ENSURE THE
COMPETITIVENESS
OF OUR SECTOR
OVER THE LONG
TERM.**

SYLVAIN BÉDARD

President, Supply Chain Working Group

Competitiveness

SYLVAIN BÉDARD

President, Supply Chain Working Group

Chief Executive Officer

Sonaca Montréal

In a world that is globalizing and where market rules are constantly in flux, the Québec supply chain must adapt to the changing needs and growing expectations of prime contractors.

**MEMBERS OF
THE WORKING GROUP**

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Martin Gagné
Sonaca Montréal

André Lavigne
CAMAQ

Robert Leclerc
CAE Inc.

Martin Richard
Héroux-Devtek

Philippe Stas
Bell Helicopter Textron Canada

Gérald Tremblay
CAMAQ

OBSERVER

Normand Voyer
STIQ

In a world that is globalizing and where market rules are constantly in flux, the Québec supply chain must adapt to the changing needs and growing expectations of prime contractors. The only way for it to remain competitive is by improving its business practices and being attentive.

It is primarily in this context that, in 2011, the Supply Chain Working Group launched the MACH Initiative, a program designed to enhance the competitiveness of Québec suppliers and recognized for the unique way it strengthens links between SMEs and prime contractors. The MACH Initiative is already demonstrating that it is effectively meeting its set objectives. The results of the first cohort are very convincing, and major Québec OEMs have already remarked on the positive impacts of the program on the efficiency of their supply chain. The proliferation of simultaneous improvements on suppliers enrolled in the MACH Excellence Framework is generating performance gains at all levels of the value chain and ultimately increasing the competitiveness of the industry in Québec.

On a more personal note, I have accepted to chair the Supply Chain Working Group, succeeding Philippe Hoste of Sonaca Montréal, who has assumed this role with passion since 2008. I also want to recognize the hard work put in by all members of the cluster to make the Québec supply chain a world-class model. It is by joining our forces that we will ensure the competitiveness of our sector over the long term.

Working Group Achievements

MACH INITIATIVE – 3rd YEAR, 3rd COHORT

More than two years after its launch, the MACH Initiative is already showing positive results in improving the performance of suppliers based on the criteria and expectations of the MACH Excellence Framework.

During a press conference held at the International Paris Air Show in June, Aéro Montréal officially launched the call for nominations for the third MACH cohort in the presence of Nicolas Marceau, Québec Minister of Finance and the Economy.

Formalized in the fall, the third cohort is composed of 10 new suppliers and four new sponsors, including Air Canada Technical Services representing the MRO sector. Again this year, a supplier in the first cohort decided to become a mentor for a key company in the supply chain. The MACH Initiative has therefore achieved its goal of significantly improving the Québec value chain by reaching companies at all levels.

The selected companies join the ranks of 30 suppliers and their 17 sponsors already involved in the initiative. They will benefit from services and a customized mentor to assess their performance, identify performance

gaps, and identify actions needed to improve and better position themselves in the supply chain. MACH Excellence Framework audits for this third cohort began in October and continued through December 2013.

PERFORMANCE LABELS – COHORTS 1 AND 2

In the course of the year, suppliers in cohorts 1 and 2 began their personalized development and improvement program to enhance their performance according to 15 business processes of the MACH Excellence Framework with support from their respective sponsors.

Cohort 2 suppliers received a first performance label showing their maturity level upon entry into the program. The award ceremony took place during the opening of the AEROMART Montréal convention in the presence of Elaine Zakaïb, Minister for Industrial Policy and the Québec Economic Development Bank, as well as the mentor of the MACH Initiative, Bombardier Aerospace, and strategic partner Aluminerie Alouette.

Several suppliers from cohort 1 completed their first cycle of the development and improvement program. The companies had a second audit to show progress made since their entry into the program in 2012.

The audit results are conclusive, with all SMEs from the first cohort improving their performance relative to their first audit. Many of them have progressed to a higher MACH performance label.

The performance label awards ceremony for the first cohort was held during the opening cocktail of the Aerospace Innovation Forum in the presence of Jean-Luc Trahan, President of the Commission des partenaires du marché du travail and Fassi Kafyke, Director, Strategic Technologies, at Bombardier Aerospace.

After two completed years, the MACH Initiative has enhanced the skills of the workforce through training and coaching. Audits have clearly demonstrated a progression in the adoption of best practices and closer collaboration among customers and suppliers.

MACH EVOLUTION SERIES

To sustainably enhance the competitiveness of companies engaged in the MACH Initiative, it is critical to improve the knowledge and skills of their workforce. The MACH Evolution conference series provides training on best practices and tools to improve proficiency in processes that are at the heart of the MACH Excellence Framework.



This year, Aéro Montréal organized four MACH Evolution conferences in collaboration with Fujitsu and PricewaterhouseCoopers. Each event attracted a full house, with a total of 169 participants for the year.

The conferences' varied subjects allowed members to learn more about mapping value chains, management systems and performance monitoring, the establishment of a continuous improvement strategy and project planning.

The conferences, responding to various key business processes of the MACH Excellence Framework, were highly appreciated by the participants, recording a satisfaction rate of 100%.

MACH VISIBILITY PROGRAM

In addition to enhancing supplier performance from an operational point of view, the MACH Initiative aims to support business development through a visibility program that includes, among other things, the production of corporate documents, media relations and participation in trade missions. To maximize the benefits of visibility actions, Aéro Montréal prepared a communication plan specific to the MACH Initiative.

Aéro Montréal participated in two trade missions to increase the international scope of the MACH Initiative and the reputation of companies enrolled in the program. During AEROMART Montréal in April, Aéro Montréal had a booth that highlighted the industrial capabilities of Québec's aerospace cluster, the MACH Initiative and companies in the first two cohorts. At the 50th International Paris Air Show, MACH and companies engaged in this initiative were represented at the Québec booth through new interactive panels.

Both of these missions offered unique opportunities for suppliers to make contact with numerous prime contractors through many customized B2B meetings.

More than two years after its launch, the MACH Initiative is already showing positive results in improving the performance of suppliers.



3



4



5



6

1. Cohort 1 – MACH Initiative
2. Cohort 2 – MACH Initiative
3. Booth at AEROMART Montréal
4. MACH Evolution conference
5. Interactive panels at the Paris Air Show
6. Signature Skywin Wallonia

WORKING GROUP

Supply Chain

MACH INITIATIVE GOING GLOBAL

During the International Paris Air Show, Aéro Montréal signed a third framework agreement for collaboration with the Skywin Wallonia aerospace cluster. Following the signing ceremony, the two organizations launched a feasibility study with a view to implementing the MACH Initiative in Wallonia.

As the first milestone for emulating the MACH Initiative outside our borders, this new international recognition clearly demonstrates the increasing profile of the MACH Initiative. It also promotes the establishment of the MACH performance label as a guarantee of quality to global prime contractors.

The feasibility study clearly demonstrated the applicability of the MACH Initiative model to the needs of an international partner. The Walloon government has provided funding to implement the initiative, with operations set to begin in 2014.

Cohort 1 – Performance Labels

Supplier	Cycle 1	Cycle 2
Abipa Canada	MACH 3	MACH 3
Aviation Lemex (ATLAS Aéronautik)	MACH 2	MACH 3
Avior Integrated Products	MACH 3	MACH 3
Composites VCI	MACH 2	MACH 3
DCM Aerospace	MACH 2	MACH 3
Delastek	MACH 2	MACH 3
Electro-Kut	MACH 2	MACH 2
Groupe Meloche	MACH 3	MACH 4
Hutchinson Aerospace & Industry	MACH 3	MACH 3
Légo Finishing Center	MACH 1	Upcoming
Mésotec	MACH 2	MACH 3
NSE Automatech	MACH 2	MACH 2
Précision S.F. Tech	MACH 1	MACH 2
RTI-Claro	MACH 3	MACH 4
S.I.D.O. (ATLAS Aéronautik)	MACH 2	MACH 3
Société d'Outillage M.R.	MACH 1	MACH 1
Techfab	MACH 1	MACH 2
Techniprodec	MACH 2	MACH 3
Trident Industries	MACH 2	MACH 2

Cohort 2 – Performance Labels

Supplier	Cycle 1
Aérosphère	MACH 2
Air Data	MACH 2
Air/Ground Equipment	MACH 2
Alta Precision	MACH 2
CP Tech	MACH 2
Elimetal	MACH 2
PCM Innovation	MACH 2
Tecnickrome Aéronautique	MACH 3
Tékalia Aéronautik	MACH 3
Xiphos Systems Corporation	MACH 3

Cohort 3

Supplier	Sponsors
AMEC Machining	Groupe Meloche
DICI Industries	L-3 MAS
Ellison Canada Surface Technologies	GE Canada
Industries CPS	Héroux-Devtek
Les Outils Arpex	L-3 MAS
M1 Composites Technology	Air Canada
Maetta Sciences	Pratt & Whitney Canada
Mecaer America	Bell Helicopter Textron Canada
MF2 AÉRO	RTI-Claro
Sinters America	SAFRAN - Turbomeca Canada

Excellence

KEVIN P. SMITH

President, Human Resources Working Group

Vice President, Human Resources

Pratt & Whitney Canada

After an intense year of strategic planning, 2013 was marked by action. The Human Resources Working Group began to implement the first measures contained in its White Paper on Human Resources.

**MEMBERS OF
THE WORKING GROUP**

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Serge Brassat
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Solange Fresneau
TechFab

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Bell Helicopter Textron Canada

Gilbert Guérin
Héroux-Devtek

Mario Héroux
ÉMAM

Nancy Jobidon
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Pratt & Whitney Canada

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There are many issues affecting the industry's workforce. These include new vacancies to be filled within the next 10 years, challenges related to an increase in early retirements, the alignment of employee training with the needs of the industry and a high school dropout rate. Everyone agrees that action is needed now to ensure generational renewal in our companies.

After an intense year of strategic planning, 2013 was marked by action. The Human Resources Working Group began to implement the first measures contained in its White Paper on Human Resources.

To meet short-term challenges, we first focused on initiatives aimed at identifying the critical skills for our companies and at promoting the implementation of best practices in knowledge transfer. With a view to long-term impacts, the Working Group also pursued its efforts to encourage student retention and increase awareness of our industry among young people. Furthermore, I am pleased by the successful results of bridges built in 2010 between ÉMAM, ÉNA and universities. These are designed to enable young people to develop their full potential.

I want to emphasize the remarkable involvement of members of the group who have worked to implement these proposals tailored to the needs of our companies. As president of the Working Group, I am convinced that the success and future of our industry depends on the highly qualified women and men who work there. Together, we are helping to create the next generation of managers, workers, technicians and engineers in aerospace.

Working Group Achievements

INVENTORY OF SKILLS AND CRITICAL KNOWLEDGE

The Human Resources Working Group started to take an inventory of skills and critical knowledge in the aerospace industry. This priority project, as stated in the group's 2012 strategic plan, aims to identify critical skills that need to be developed among industry employees.

To assess the skills deemed essential for companies, a series of interviews were conducted with a representative sample of companies in the aerospace cluster. This detailed compilation will help to identify gaps and develop possible solutions to remedy the situation, such as continuing education, knowledge transfer within companies and even changing some school curricula to integrate the teaching of these crossover skills to the next generation.

Ultimately, the inventory will be incorporated in the MACH Excellence Framework business process. For this purpose, a proficiency diagnostic tool will be implemented to evaluate companies.

Research and interviews began in 2013. The final report will be tabled during 2014.

PASSION FOR FLIGHT

To attract high school students to science and aerospace, the Working Group began the implementation of a project called "Passion for Flight." With the help of Discovery Education, Aéro Montréal and Bombardier Aerospace created the framework of a science program that may become part of the Secondary 1 to 3 school curriculum.

The program will detail the scientific principles that are involved in the manufacture of an aircraft and during flight. It will offer the possibility to design an aircraft using software.

The school curriculum is being submitted for eligibility to the Ministère de l'Éducation du Québec.

PASSION FROM WITHIN

Aéro Montréal is promoting the "Passion from Within" project among companies in the aerospace cluster. Implemented by Bombardier Aerospace, this structured class activity program for Grade 5 and 6 students will be given by employees of participating companies.

The employees will have access to an activity kit, consisting of a PowerPoint presentation, a presentation guide and a paper airplane model developed by engineers at Bombardier Aerospace. These tools will popularize the scientific principles of airplane flight during a 45-minute presentation as part of bring your parents to school days.

The presentations will begin in 2014.

EUREKA! FESTIVAL

For the fifth consecutive year, Aéro Montréal took part in Eureka! Festival. This major celebration of science for young people and curious minds of all ages was held on the Quays of the Old Port and at the Montréal Science Centre. Attended by 85,770 visitors on June 14, 15 and 16, it highlighted careers related to aerospace and featured scientific demonstrations.

During the three-day festival, Aéro Montréal met with over 2,100 young people who participated in "The sky is the limit" program. They were given information on the forces acting on an airplane in flight from a team of experienced facilitators, built gliders and participated in a demonstration. On average, 88 gliders an hour were produced and distributed during the event.



SIGNING OF THE AÉROFORMATION AGREEMENT

On December 4, the Institut de formation aérospatiale (IFA), École nationale d'aérotechnique (ENA) and the Centre for Aerospace Professional Education (CAPE), a partnership between McGill University and the École de technologie supérieure, signed a cooperation agreement formalizing the launch of the AéroFormation partnership in collaboration with Aéro Montréal.

The objective of the AéroFormation partnership is to develop a common framework for offering services to aerospace industry partners that will better respond to their continuing education needs at all levels, including specialized workers, technicians, engineers and professionals.



To attract Grade 5 and 6 students to science and aerospace, the Working Group began the implementation of a project called **“Passion from Within.”**

With the help of:
Bombardier Aerospace



1. Eureka! Festival
2. Eureka! Festival
3. Signature AéroFormation
4. Eureka! Festival

OUR VALUE CHAIN HAS UNDENIABLE ADVANTAGES

HUGUE MELOCHE

President, Markets Development – SMEs Working Group



Internationalization

HUGUE MELOCHE

President, Markets Development – SMEs Working Group

President & Chief Executive Officer
Groupe Meloche

Québec aerospace SMEs are facing profound changes that are challenging their ways of doing business.

**MEMBERS OF
THE WORKING GROUP**

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MarieChantal Chassé
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Daniel Cyr
Atlas Aeronautik

François Cyr
Techfab

Mario Lépine
DCM Aerospace

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John Maris
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Nancy Venneman
Altitude Aerospace

OBSERVERS

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Industry Canada

Gilles Brabant
MFEQ

Québec aerospace SMEs are facing profound changes that are challenging their ways of doing business. In a context of globalization and an aviation supply chain undergoing transformations, prime contractors are reducing the number of suppliers, preferring to work with integrators and Tier-1 suppliers. This displacement of the traditional customer base is significantly affecting our local industry, which is composed almost entirely of small Tier-3 and Tier-4 companies that are ill-equipped to win contracts with Tier-1 companies established primarily abroad.

SMEs are therefore faced with a strategic choice: to grow to the Tier-2 level or to specialize, all while increasing their performance, to attract the attention of global integrators and the largest Tier-2 SMEs. The Working Group initiated a strategic review at the beginning of the year with a view to fostering the emergence of Tier-2 SMEs and better supporting the international development of all SMEs. The priority objectives that emerged will allow us to maximize the impact of each of our actions and to evaluate their effectiveness through the introduction of performance metrics.

I am honoured to be succeeding Guillermo Alonso, who so brilliantly oversaw the creation of the Markets Development - SMEs Working Group in 2012. Our value chain has undeniable advantages, and for the next two years I invite SMEs to join forces and work together to strengthen our industrial base and increase our chances of integrating in future aircraft platforms.

WORKING GROUP

Markets Development - SMEs

Working Group Achievements

ELECTION OF WORKING GROUP MEMBERS DURING THE AGM

At the AGM in April 2013, Aéro Montréal elected 12 new SME representatives to serve for two years on the Markets Development - SMEs Working Group.

This initial call for candidates generated a tremendous response. Some 27 SME leaders, industry members of Aéro Montréal, submitted applications to participate in business development and ensure the presence of Québec SMEs worldwide.

Of the 12 elected members, four representatives were appointed to the Board of Directors, and Hugue Meloche was elected as President of the Working Group.

STRATEGIC REVIEW AND ACTION PLAN

Following the election of new members, the Working Group initiated a strategic review to establish a clear vision and a mission that will guide priority actions of the group.

Vision: To become the best aerospace SME network on the global market.

Mission: To strengthen the network of Québec aerospace SMEs and support their global business development processes.

To achieve these objectives, Aéro Montréal developed a survey to fully understand SMEs' marketing practices, target markets and development priorities.

Subsequently, a strategic planning exercise defined the priority action plan to achieve the set goals and respond to the Working Group's mission.

LAUNCH OF A FUND FOR FINANCING R&D TAX CREDITS

During the Aéro Financement Summit, Aéro Montréal announced its support for the creation of a fund for financing R&D tax credits established by Finalta Capital and dedicated to providing strategic support for R&D projects carried out by innovative companies in the Québec aerospace industry.

The R&D tax credit financing fund for the aerospace sector has \$15 million available to reduce the financial pressure on the working capital of aerospace companies that are in the process of obtaining tax credits for research and development.

NETWORKING EVENTS

To promote networking among its members, Aéro Montréal continues to organize networking activities. This year, the cluster

also implemented the "Horizon SME" conference series in order to improve the level of knowledge in developing new markets and "Action SME" to address important issues related to company management.

CONFERENCES AND NETWORKING DINNERS

Aéro Montréal organized three Action SME conferences, three Horizon SME conferences and two networking dinners. Each event was a resounding success. In 2013, 308 participants attended various seminars and networking events.

The Action SME conference's varied subjects enabled members to learn more about the programs offered to SMEs by Emploi-Québec, about the financing of innovation in the current economic environment and about enabling technologies in precision machining in collaboration with NRC-IRAP and the OAC.

As part of the Horizon SME lecture series, participants had the opportunity to learn about the characteristics of the Russian and Mexican markets. In addition, to ensure the commercial success of the mission to the International Paris Air Show at Paris-Le Bourget, Aéro Montréal also offered



participants a preparatory session on how to maximize the results of a trade show and conduct effective business meetings.

The Honourable Christian Paradis, Minister of Industry and Minister of State (Agriculture), was invited as a keynote speaker during the first networking dinner on May 23. Mr. Paradis came to speak directly with members of the aerospace industry present. He also presented the industrial policy put forward by the Canadian Government following the report of the Aerospace Review.

AEROSPACE CLUSTER'S CLASSIC GOLF TOURNAMENT

The Aerospace Cluster's Classic Golf Tournament was a phenomenal success! With its new name and renewed imaging, this networking event is a must for SMEs. This year, the Classic again smashed attendance records with 282 players and 327 participants at the cocktail and dinner. Held for the third consecutive year at the Elm Ridge Country Club, the event featured information booths on the golf grounds sponsored by aerospace companies and service suppliers.

MARKET DEVELOPMENT

During the year, the Markets Development - SMEs Working Group identified air shows and international B2B opportunities, organizing the participation of aerospace SMEs in these events as well as in trade missions.

On all these occasions, Aéro Montréal was the flag bearer for the industrial capabilities of Québec's aerospace cluster as well as SMEs.

AEROMART MONTRÉAL

Aéro Montréal headed the Québec delegation attending the Salon AEROMART Montréal from April 23 to 25. During this major international professional event, the cluster had a booth at the entrance hall of exhibitors which highlighted the skills and industrial capabilities of SMEs.

To help SMEs promote their products and services, and to develop new business partnerships with international companies attending the event, participants had access to targeted B2B meetings and were able to mingle, in a informal setting, at a networking cocktail which, for the first time, was open to all members of Aéro Montréal SMEs, even if they did not participate in AEROMART.

INTERNATIONAL PARIS AIR SHOW AT PARIS-LE BOURGET

Aéro Montréal and Export Québec played a key role for SMEs by leading the Québec delegation to the 50th annual International Paris Air Show from June 17 to 21. Featuring 2,215 exhibitors and welcoming 140,000 industry professionals and 285 delegations from 102 countries, this show is essential for the marketing of Québec's expertise.

The year 2013 marked a turning point for the Québec delegation. The new Québec and Aéro Montréal kiosk, with a modern and sleek look, now features a second floor for participants' business meetings. Using materials such as brushed aluminum and glass and featuring a lacquered finish, LED lights and a balanced use of digital technologies, it provides an elegant environment for SMEs to showcase their companies.

Thanks to funding from the Government of Québec and Canada Economic Development, 29 SMEs were part of this record delegation. They were well represented, notably through the establishment of a pod for each company, a holographic pyramid and information on the cluster's industrial capabilities displayed on interactive screens.



1. Action SME Event
2. The Honourable Christian Paradis at an Action SME event
3. Booth at AEROMART Montréal
4. Aerospace Cluster's Classic Golf Tournament
5. Aerospace Cluster's Classic Golf Tournament

WORKING GROUP

Markets Development - SMEs

Participating SMEs also benefited from a program of activities providing opportunities for strategic and international networking and customized B2B meetings. For example, the show began with an opening cocktail attended by the Honourable Edward Fast, Minister of International Trade. In all, 210 B2B meetings were held, allowing SMEs to establish links with international companies.

MISSIONS

In collaboration with the governments of Québec and Canada, Aéro Montréal led Québec aerospace company delegations during two international trade missions in Ohio and Arizona. A total of 10 companies, three universities and a research centre participated in missions in 2013.

NBAA 2013

In collaboration with Export Québec, Aéro Montréal assumed management of the delegation of 15 Québec companies attending the NBAA 2013 in Las Vegas. As part of this international event, Aéro Montréal oversaw activities at the delegation's bustling central kiosk and was able to showcase Québec's industrial capabilities.



6. The Honourable Edward Fast at the Paris Air Show opening cocktail
7. Québec and Aéro Montréal's booth at the Paris Air Show





**INCREASE THE
COHESION
AND OPTIMIZE
COMPETITIVENESS
OF QUÉBEC'S
AEROSPACE
CLUSTER**

BOARD OF DIRECTORS

Board of Directors



1. **Maria Della Posta***
Chair of the Board
Senior Vice President, Sales & Marketing
Pratt & Whitney Canada
2. **Guillermo Alonso***
President of the Executive Committee
President
Alta Precision
3. **Hélène Séguinotte***
Vice President of the Board
Country Delegate
SAFRAN
4. **Éric Beauregard**
President & CEO
AV&R Aerospace
5. **Sylvain Bédard**
CEO
Sonaca Montréal

6. **Serge Brasset**
General Manager
Collège Édouard-Montpetit
7. **Patrick Champagne***
Vice President, Cockpits and
Systems Integration
Esterline CMC Electronics
8. **Jacques Comtois**
President
L-3 MAS
9. **Pierre Delestrade**
President & CEO
EADS Canada
10. **Marc Donato**
Vice President & General Manager
MDA Satellite Systems

11. **Clément Fortin**
President & CEO
CRIAQ
12. **Hélène V. Gagnon**
Vice President, Public Affairs,
Communications, Corporate Social
Responsibility and Achieving
Excellence System
Bombardier Aerospace
13. **Denis Giangli***
Corporate Treasurer
Vice President, Finance and Administration
Rolls-Royce Canada



14. **Michel Grenier**
Vice President & Managing Director
 Thales Canada, Aerospace

15. **Christophe Guy**
CEO
 Polytechnique Montréal

16. **Mario Héroux**
Director
 ÉMAM

17. **Barry Kohler**
President
 Bell Helicopter Textron Canada

18. **Jerzy Komorowski**
General Manager, Aerospace
 NRC

19. **Gilles Labbé**
President & CEO
 Héroux-Devtek

20. **Claude Lessard**
President
 Delastek

21. **Hugue Meloche**
President & CEO
 Groupe Meloche

22. **Marc Parent**
President & CEO
 CAE Inc.

23. **Philippe Simonato**
Director
 GE Aviation Bromont

24. **Gérald Tremblay**
Grand Lodge Representative
 IAMAW

25. **Serge Tremblay**
Executive Director
 CAMAQ

PERMANENT GOVERNEMENT OBSERVERS

26. **Mario Bouchard**
Assistant Deputy Minister
 Ministère des Finances et de l'Économie
 du Québec

27. **Diane L'Écuyer**
Interim Executive Director, Québec Region
 Industry Canada

Communauté métropolitaine de Montréal

* Executive Committee Members

Mobilization and Contributions

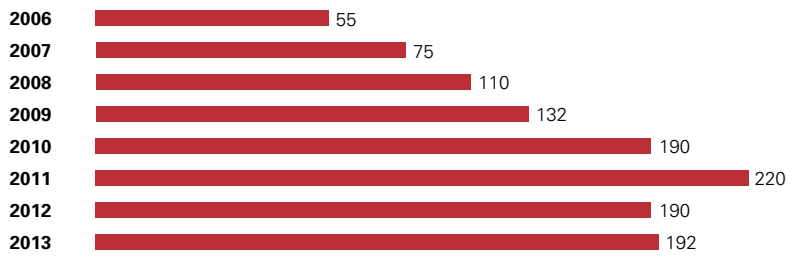
STRONG MOBILIZATION

Since the creation of Québec's aerospace cluster in 2006, the mobilization of members of Aéro Montréal's various committees and working groups has increased steadily and now stabilized. Over the past four years, Aéro Montréal has mobilized an average of nearly 200 executives and industry specialists.

There has also been a significant increase in the total participation of cluster members as part of various Action SME, Horizon SME and Evolution MACH events organized by Aéro Montréal. Attendance at the Aerospace Innovation Forum has grown by about 233% since its launch in 2007. Aéro Montréal's AGM brings together senior executives from industry and is also gaining popularity, with a 346% increase in participation since its inception in 2006.

346%
INCREASE IN PARTICIPATION TO AGM

Mobilization



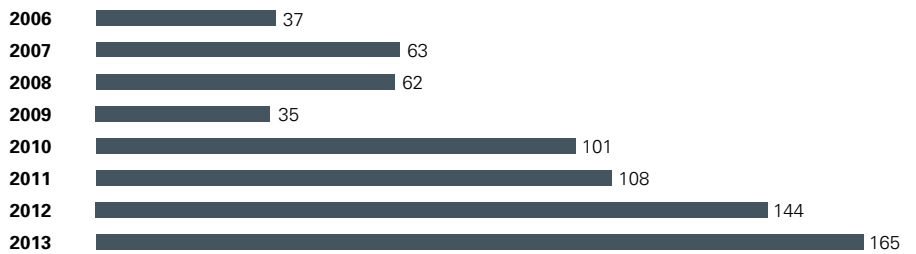
■ Mobilization - persons

SME Events Participation



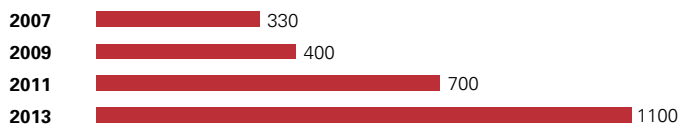
■ Number of participants

AGM Participation



■ Number of participants

Aerospace Innovation Forum Participation



■ Number of participants

MACH Evolution Events Participation



■ Number of participants

MEMBER SATISFACTION

Aéro Montréal conducts various satisfaction surveys among participants to measure the quality of its events and activities and ensure it provides services that meet the specific needs of its members while promoting networking among all industry stakeholders.

To date, the overall satisfaction of participants in Aéro Montréal activities is excellent. On average, over 80% of respondents have met potential customers who would have otherwise been difficult to meet, and over 75% obtained or believe they have obtained follow-ups to individual meetings they had.

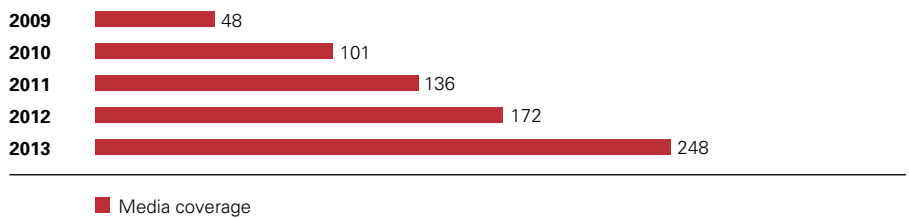
Finally, over 96% of respondents were satisfied or very satisfied with Aéro Montréal events.

INCREASED VISIBILITY

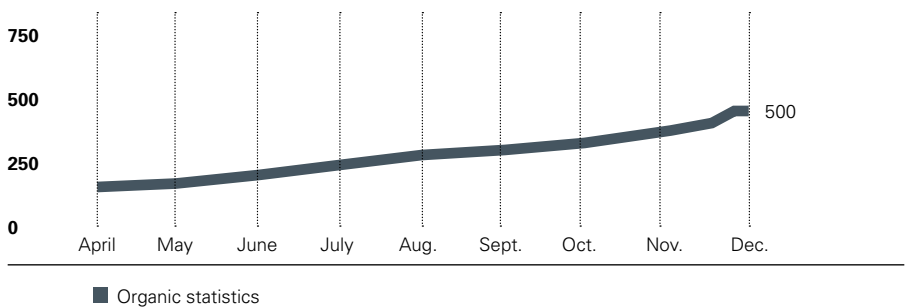
Through its communication efforts, Aéro Montréal helps to promote the industrial capabilities of Québec's aerospace cluster and its members and underscores the positive impacts of the industry on the Québec economy.

Since 2009, media relations have generated significant coverage, with an increase of 416% in five years. This year, Aéro Montréal developed a social media strategy and established its virtual community. The number of followers on Twitter and LinkedIn accounts increased significantly during the Aerospace Innovation Forum.

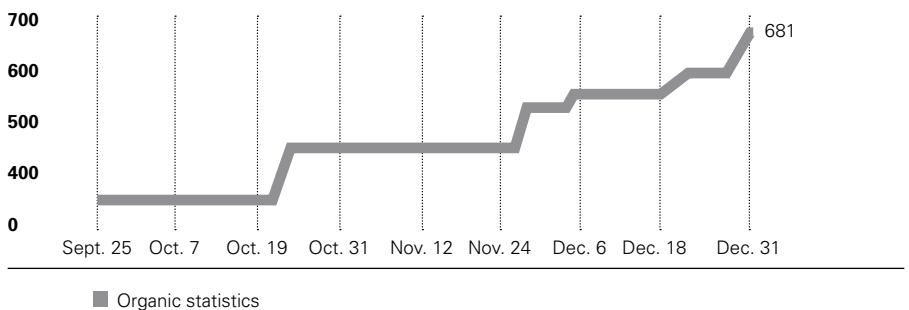
Media coverage growth



Follower trend – LinkedIn



Follower trend – Twitter



Mobilization and Contributions

PROJECTS GENERATED BY THE MACH INITIATIVE

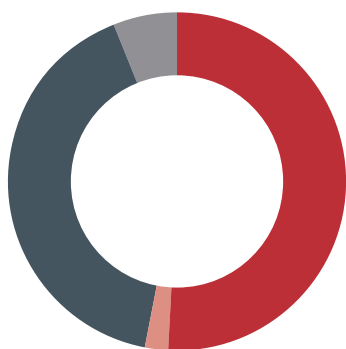
Thanks to the tailored development and improvement programs of the MACH Initiative, suppliers in cohorts 1 and 2 have implemented improvement projects and accessed training and mentoring to enhance their performance. This is based on 15 business processes of the MACH Excellence Framework with the support of their respective sponsors.

	Number of completed or ongoing improvement projects	Number of completed or ongoing workforce skill development projects	Project direct investments	In-kind investments (estimate)
COHORT 1 cycle 1	59	35	\$817,445	\$1,179,650
COHORT 1 cycle 2	56	20	\$1,583,330	\$937,925
COHORT 2 cycle 1	37	17	\$543,992	\$801,675
COHORT 3 cycle 1	—	—	\$450,000	\$126,000
2013 CUMULATIVE (since the start of the Initiative)	152	72	\$3,394,767	\$3,045,250

Note: Direct and indirect investments associated with the third cohort represent costs incurred to date and are subject to change.

HIGHER CONTRIBUTION

This year, contributions in absolute value increased by 62% compared to 2012. This significant increase is mainly due to the introduction of new structuring projects for the cluster, such as the digital ecosystem and critical skills project, as well as the holding of the Aerospace Innovation Forum 2013. Since the creation of the cluster in 2006, contributions in absolute value have increased by 355%.

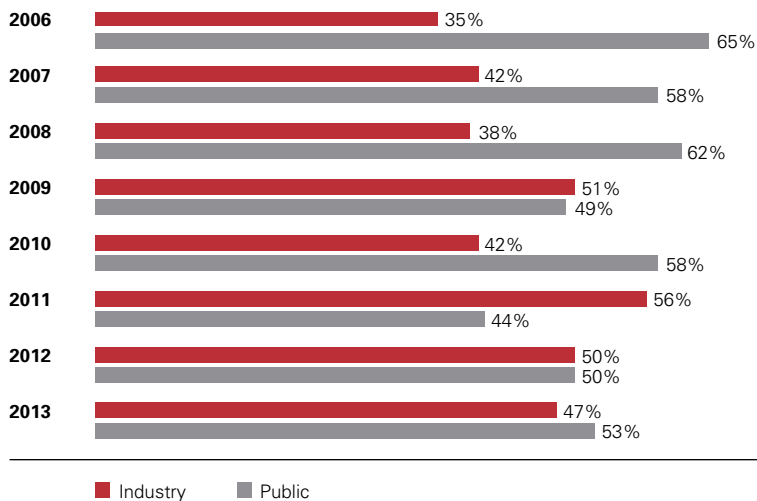


Distribution of public and industry contributions

2013

Public	Cash contribution	\$2,252,508	51.0%
Public	In-kind contribution	\$92,980	2.1%
Industry	Cash contribution	\$1,812,248	41.0%
Industry	In-kind contribution	\$261,100	5.9%
Total		\$4,418,836	100%

Evolution of total contributions



Evolution of total contribution in absolute values

	2006	2007	2008	2009	2010	2011	2012	2013
Industry	\$340,675	\$500,375	\$428,700	\$1,058,696	\$656,892	\$1,520,127	\$1,349,176	\$2,073,348
Public	\$629,325	\$712,625	\$707,600	\$1,024,398	\$894,484	\$1,206,741	\$1,371,725	\$2,345,488
	\$970,000	\$1,213,000	\$1,136,300	\$2,083,094	\$1,551,376	\$2,726,868	\$2,720,901	\$4,418,836

Governance

BOARD OF DIRECTORS

The Board of Directors (BoD) of Aéro Montréal manages the affairs of the Corporation. It is composed of senior executives of companies and institutions in the aerospace industry or their designated representatives. The board has 25 seats, plus two observers, and ensures representation from the entire Québec aerospace industry: prime contractors, OEMs, integrators and MROs, SMEs and institutional members (associations, educational and research institutions and trade unions).

In fiscal 2013, Maria Della Posta, Senior Vice President, Sales and Marketing at Pratt & Whitney Canada, succeeded Gilles Labbé, President and Chief Executive Officer of Héroux-Devtek, as Board Chair. Hélène Séguinotte, Country Delegate SAFRAN, became Vice Chair and Denis Gangi, Vice President, Finance and Administration, Rolls-Royce Canada, was Treasurer. Suzanne M. Benoît, President of Aéro Montréal, served as Corporate Secretary.

Two Board committees ensure the good governance of the organization. These are the Human Resources Committee, chaired by Hélène Séguinotte, and the Finance and Audit Committee, chaired by Denis Gangi.

During the year, new members joined the Board of Directors. Hugue Meloche, President and CEO of Groupe Meloche, Claude Lessard, President of Delastek, and Éric Beauregard, President and CEO of AV&R Aerospace, were elected to the Board for two years as representatives of SMEs. They succeeded MarieChantal Chassé, President of JMJ Aerospace, Claude Gagliardi, President of Technickrome Aéronautique, and John Maris, President of Marinvent Corporation. To represent Sonaca Montréal, Sylvain Bédard, CEO, replaced Philippe Hoste, and to represent the ÉMAM, Mario Héroux, Director, succeeded Josée Peloquin. Christophe Guy, CEO of Polytechnique Montréal, replaced Heather Munroe-Blum, Principal and Vice-Chancellor of McGill University.

The representation of provincial and federal governments on the Board of Directors of Aéro Montréal is respectively provided by Diane L'Écuyer, Interim Regional Executive Director, Industry Canada, and Martin Aubé, Director, Transport Equipment Division, replacing, on an interim basis, Mario Bouchard, Assistant Deputy Minister at the Ministère des Finances et de l'Économie.

In 2013, the Board of Directors of the cluster held three meetings (Annex – Chart of contributions in kind per sector 2013).

THE EXECUTIVE COMMITTEE

The Executive Committee exercises all the powers of the Board for the ongoing administration of the affairs of the Corporation. It has a specific mandate to report on its activities at board meetings and provide advice and recommendations for Board policies and decisions. The Executive Committee consists of six members and was chaired in 2013 by Guillermo Alonso, President of Alta Precision. The Executive Committee met six times in 2013 (Appendix – Chart of contributions in kind per sector 2013).

GENERAL MANAGEMENT

Suzanne M. Benoît is President of Aéro Montréal. As such, she oversees the implementation of decisions taken by the Board and Executive Committee. She ensures the management and coordination of the cluster's various Working Groups and work committees and reports to the administrative organizations.

To support the actions of the cluster, the President is supported by a team of 11 employees and consultants including Pierrette Daigle, Martin Lafleur, Martin Hamel, Amélie Hudon, Mathieu Cléroux, Sharon Core, Eve Giroux, Maxime Hince, Cédric Lalaizon, Irina Sarateanu and Jean-Mathias Sargologos.





WORKING GROUPS

The Working Groups, composed of representatives from the aerospace industrial sector in Québec and the institutional sector comprised of associations, unions and government, focus on areas of intervention set out in Aéro Montréal's strategic plan, including issues that the aerospace sector wants to explore.

Each group conducts an analysis aligned with its specific theme and proposes to various Aéro Montréal committees structuring projects or activities that directly correspond to the areas outlined in the cluster's strategic plan.

Each Working Group is created for a set period with specific goals. At the end of a mandate, it may be renewed by the Board if there is a need to continue for another term.

Working Groups are managed using a methodology adapted from Six Sigma and are equipped with a rigorous and accountable operating process. This process ensures sound management of the work being performed and regular accountability to the Board.

Five Working Groups and a Strategic Committee are active within Aéro Montréal.

WORKING GROUPS AND STRATEGIC COMMITTEE

- Branding and Promotion
- Innovation
- Supply Chain
- Human Resources
- Markets Development - SMEs
- Defence Strategic Committee

APPENDIX

A large satellite dish antenna is mounted on a complex mechanical structure within an anechoic chamber. The chamber's walls, floor, and ceiling are covered with various types of electromagnetic absorbers, including pyramidal and cylindrical shapes, designed to eliminate reflections. The scene is dimly lit, with a strong light source from the left creating a bright glow on the dish's surface and casting long shadows.

Presentations and Meetings in 2013

January	<p>Presentation to the Institute of Industrial Engineering Conference</p> <p>MACH Initiative presentation to representatives of the Chihuahua State Government</p> <p>MACH Initiative presentation to innovation and supply chain leaders at Rolls-Royce Canada</p> <p>Concordia Summit presentation (Institute of Industrial Engineering Conference)</p>	July	<p>Presentation to David Kassar, President of Kassar International</p> <p>Meeting with Azar Mirabedini of OPTIMAREL TEK</p> <p>Presentation to Emmanuel Rousseau, Director, Econocom Aerospace</p>
February	<p>Presentation at the Canada-Ohio Aerospace Summit</p> <p>MACH Initiative presentation at <i>Capital régional et coopératif Desjardins</i></p> <p>Presentation to Rémi Quirion, Québec Chief Scientist</p> <p>Presentation to the Thailand Board of Investment delegation</p>	August	<p>Presentation to Alain Olivier, Director, Québec Office in Mumbai</p> <p>Presentation to Andrew Zvirzdin, Political & Economic Officer, U.S. Consulate</p> <p>Presentation to Andrew C. Parker, U.S. Consul General</p>
March	<p>Presentation to Caroline Émond, Québec Delegate General in Brussels</p> <p>Presentation to Zouhair Kanouni, Canadian trade delegate to Morocco</p> <p>Meeting with Charles Hergott, speaker on Russian aerospace market</p> <p>Presentation to <i>Expansion Québec</i></p>	September	<p>Presentation to the Rio Grande do Sul, Brazil delegation</p> <p>MACH Initiative presentation to DEL breakfast conference</p>
April	<p>Presentation to Bernard Plano, President, Midi-Pyrénées</p> <p>Meeting with Bruno Clerc, Consul General of France in Montréal</p> <p>Presentation to Austrian delegation</p> <p>Presentation to Groupe LGM, France</p> <p>Meeting with representatives of the Aerospace Cluster in Rhône-Alpes</p> <p>Meeting with representatives of GIMAS (Morocco)</p> <p>Meeting with Agnès Paillard, President of Aerospace Valley</p>	October	<p>Presentation to the Région Rhône-Alpes delegation</p> <p>Presentation to Québec foreign delegates</p> <p>Presentation to Senator Frank Horsch, State Secretary, Ministry of Economy, Transport and Innovation, Hamburg, Germany</p> <p>Presentation to Robert Caouette of EDC</p> <p>MACH Initiative presentation at the International Aerospace Quality Group Supplier Forum in Montréal</p> <p>Meeting with managers from Asco, Brussels, BE</p> <p>MACH Initiative presentation to companies from Walloon, Wavre, BE</p> <p>Meeting with European Aerospace Quality Group representatives</p> <p>Meeting with Ohio Aerospace Institute representatives</p> <p>Meeting with Marcel Kessler of TEL Mechatronics, Switzerland</p>
May	<p>Presentation to representatives of Airbus Military</p> <p>Presentation to MBA students from the Telfer School of Management of Ontario</p> <p>Presentation to Ernesto Burden, Avionics Intelligence</p> <p>Presentation to a delegation from the BavAIRia cluster</p> <p>Meeting with Nicole Piasecki, Boeing Vice President of Commercial Airplanes and General Manager of Propulsion Systems Division</p> <p>Presentation to a New Hampshire delegation</p> <p>Meeting with Mike Graney, Economic Development Council of Western Massachusetts</p>	November	<p>MACH Initiative presentation to CRIQ and BNQ representatives</p> <p>Presentation to Pedro Pomar of AERnova</p> <p>Presentation to a Brazilian delegation</p> <p>Presentation to Daniel Benchimol, President, EUROGICIEL</p> <p>Presentation to Dr. Arun Roy, Defiance Technologies</p> <p>Meeting with Jim Shehan of Pacific Northwest Aerospace Alliance (PNA)</p> <p>Meeting with Francesco Angelotti, CEO of aerospace company HTF Srl, Italy</p> <p>Meeting with Marcel Kessler of TEL Mechatronics, Switzerland</p>
June	<p>Meeting with a Kentucky delegation</p> <p>Meeting with Etienne Pourbaix of Skywin Wallonia</p> <p>Meeting with representatives from the METI Japanese delegation</p> <p>Meeting with Kansas delegation representatives</p> <p>Meeting with Singapore delegation representatives</p> <p>Meeting with Bordeaux Technowest cluster representatives</p> <p>Meeting with Dassault Aviation, France representatives</p> <p>Meeting with Pôle de compétitivité AéroCentre France representatives</p> <p>Meeting with Apulia, Italy delegation representatives</p> <p>Meeting with Snecma, France representatives</p> <p>Presentation to European Aerospace Cluster Partnership (EACP) representatives</p> <p>Meeting with Barry Warburton, Chief Executive of the West of England Aerospace Forum (WEAF)</p> <p>Meeting with La Federación Mexicana de la Industria Aeroespacial, A.C. (FEMIA) representatives</p>	December	<p>Presentation to PARI-CNRC executives</p> <p>Presentation to the head of finance and investor relations of Mecaer Aviation Group S.p.A.</p> <p>Presentation to Monique Claiborne of the Detroit Regional Chamber</p> <p>Presentation to Bernd Buchenberget, Bavarian Ministry of Economic Affairs and Media, Energy and Technology</p> <p>Presentation to Trevor Pawl of Business Connect, State of Michigan</p> <p>Presentation to J.C. Hall of Pacific Northwest Aerospace Alliance (PNA)</p> <p>Presentation to a delegation from South Korea</p>

In-kind contributions from the sector in 2013

Committees	Duration (In hours)	Total number of participants	Number of private participants	Rates (\$/hour/ participants)	Location, catering, telephone services	Other contributions	Industry total	Grand total, industry & public
Executive Committee								
Meeting February 6	2	5	5	\$400			\$4,000	\$4,000
Meeting March 1	0.5	5	5	\$400			\$1,000	\$1,000
Meeting March 20	2	4	4	\$400			\$3,200	\$3,200
Meeting June 11	2	4	4	\$400			\$3,200	\$3,200
Meeting July 8	0.5	6	6	\$400			\$1,200	\$1,200
Meeting October 9	2	6	6	\$400			\$4,800	\$4,800
							\$17,400	\$17,400
Board of Directors								
Meeting March 20	2	18	10	\$400			\$8,000	\$14,400
Meeting June 11	2	23	18	\$400			\$14,400	\$18,400
Meeting October 9	2	20	12	\$400			\$9,600	\$16,000
							\$32,000	\$48,800
Annual General Meeting								
Meeting April 15	1	165	150	\$200			\$30,000	\$33,000
							\$30,000	\$33,000
Innovation Working Group								
Meeting March 27	3	19	9	\$200			\$5,400	\$11,400
Meeting May 28	3	14	6	\$200			\$3,600	\$8,400
Meeting September 19	3	13	6	\$200			\$3,600	\$7,800
Meeting November 21	3	13	6	\$200			\$3,600	\$7,800
							\$16,200	\$35,400
Strategic technologies Committee								
Meeting January 11	3	8	7	\$200			\$4,200	\$4,800
							\$4,200	\$4,800
NRIP Brief Committee								
Meeting May 7	2	9	5	\$200			\$2,000	\$3,600
							\$2,000	\$3,600
2013 Aerospace Innovation Forum Committee								
Meeting May 30	2	4	1	\$200			\$400	\$1,600
Meeting March 18	2	7	2	\$200			\$800	\$2,800
Meeting April 8	2	5	1	\$200			\$400	\$2,000
							\$1,600	\$6,400
Markets Development - SMEs Working Group								
Meeting February 13	2	15	15	\$200			\$6,000	\$6,000
Meeting March 28	2	15	15	\$200			\$6,000	\$6,000
Meeting May 24	2	14	14	\$200			\$5,600	\$5,600
Meeting September 24	2	13	13	\$200			\$5,200	\$5,200
Strategic thinking November 8	8	12	12	\$200			\$19,200	\$19,200
							\$42,000	\$42,000
Working Group Elections								
Working Group elections - AGM April 15	2	66	66	\$200			\$26,400	\$26,400
							\$26,400	\$26,400
Prix Gilles-Demers Subcommittee								
Meeting October 7	2	2	2	\$200			\$800	\$800
Meeting November 15	2	4	4	\$200			\$1,600	\$1,600
Meeting December 9	2	4	4	\$200			\$1,600	\$1,600
							\$4,000	\$4,000

Committees	Duration (In hours)	Total number of participants	Number of private participants	Rates (\$/hour/ participants)	Location, catering, telephone services	Other contributions	Industry total	Grand total, industry & public
Supply Chain Development Working Group								
Meeting February 21	2	10	10	\$200			\$4,000	\$4,000
Meeting May 2	2	13	13	\$200			\$5,200	\$5,200
Meeting September 12	2	12	12	\$200			\$4,800	\$4,800
Meeting December 17	2	11	11	\$200			\$4,400	\$4,400
							\$18,400	\$18,400
MACH Steering Committee								
Meeting April 11	2	8	8	\$200			\$3,200	\$3,200
Meeting August 28	2	9	9	\$200			\$3,600	\$3,600
Meeting November 12	3	8	8	\$200			\$4,800	\$4,800
Meeting December 9	2	8	8	\$200			\$3,200	\$3,200
							\$14,800	\$14,800
Collaborative Purchasing Subcommittee								
Meeting October 30	2.5	8	8	\$200			\$4,000	\$4,000
							\$4,000	\$4,000
Human Resources Working Group								
Meeting September 6	3	16	6	\$200			\$3,600	\$9,600
							\$3,600	\$9,600
Critical Skills Committee								
Meeting June 25	2	4	2	\$200			\$800	\$1,600
Meeting July 10	2	15	10	\$200	\$200		\$4,000	\$6,200
Meeting August 30	2	16	9	\$200	\$200		\$3,600	\$6,600
Meeting November 13	2	4	3	\$200			\$1,200	\$1,600
Meeting November 22	2	3	2	\$200			\$800	\$1,200
Meeting December 13	2	3	2	\$200			\$800	\$1,200
							\$11,200	\$18,400
Passion for Flight Committee								
Meeting July 5	1	1	1	\$200			\$200	\$200
Meeting August 8	2	1	1	\$200			\$400	\$400
Meeting August 15	2	1	1	\$200			\$400	\$400
Meeting September 20	1	1	1	\$200			\$200	\$200
Meeting October 25	1.5	1	1	\$200			\$300	\$300
Meeting December 17	1	1	1	\$200			\$200	\$200
							\$1,700	\$1,700
Passion for Flight Content Committee								
Meeting September 26	8	25	6	\$200			\$9,600	\$40,000
							\$9,600	\$40,000
Passion for Flight Steering Committee								
Meeting November 6	2	13	11	\$400			\$8,800	\$10,400
							\$8,800	\$10,400
Branding and Promotion Working Group								
Meeting October 8	1	8	7	\$200			\$1,400	\$1,600
Meeting December 16	3	5	4	\$200			\$2,400	\$3,000
							\$3,800	\$4,600
Special meetings								
Meeting September 18	1	1	1	\$200			\$200	\$200
Meeting October 8	0.5	1	1	\$200			\$100	\$100
Meeting November 19	3	1	1	\$200			\$600	\$600
Meeting December 10	0.5	1	1	\$200			\$100	\$100
							\$1,000	\$1,000
Digital ecosystem-Content Subcommittee								
Meeting October 22	3	7	6	\$200	\$182.80		\$3,600	\$4,382.80
							\$3,600	\$4,382.80
Digital ecosystem-Training Subcommittee								
Meeting October 25	3	8	8	\$200	\$197.20		\$4,800	\$4,997.20
							\$4,800	\$4,997.20
Total number of hours	131	717	581					
Grand total							\$261,100	\$354,080

Lexicon

AGM

Annual General Meeting

AMTC-NRC

Aerospace Manufacturing Technology
Centre of the National Research Council
Canada

BoD

Board of Directors

CSA

Canadian Space Agency

CAMAQ

*Comité sectoriel de main-d'œuvre
en aérospatiale*

CAPE

Centre for Aerospace Professional
Education

CRÉER

*Collaboration pour des Ressources,
Équipements et Expertises de Recherche*

CRIAQ

Consortium for Research and Innovation
in Aerospace in Québec

CTA

Centre technologique en aérospatiale

CRÉER

Collaboration of Resources,
Equipment and Research Expertise)

CRIAQ

Consortium de recherche et d'innovation
en aérospatiale au Québec

CTA

Centre technologique en aérospatiale

EC

Executive Committee

ÉMAM

*École des métiers de l'aérospatiale de
Montréal*

ÉNA

École nationale d'aérotechnique

ÉTS

École de technologie supérieure

FEMIA

*Federación Mexicana de la Industria
Aeroespacial*

GARDN

Green Aviation Research and Development
Network

IAMAW

International Association of Machinists and
Aerospace Workers

IATA

International Air Transport Association

ICAO

International Civil Aviation Organization

IFA

Institut de formation en aérospatiale

MFEQ

*Ministère des Finances et de l'Économie
du Québec*

MRO

Maintenance, Repair & Overhaul

NBAA

National Business Aviation Association

NHADEC

New Hampshire Aerospace and Defense
Export Consortium

NRC

National Research Council Canada

NRC-IRAP

National Research Council Canada –
Industrial Research Assistance Program

NRIP

National Research and Innovation Policy

OAC

Ontario Aerospace Council

PARC

Project of Automated Resource Sharing
within Communities

PNAA

Pacific Northwest Aerospace Alliance

R&D

Research and Development

SA²GE

Smart Affordable Green Efficient

SME

Small and medium size enterprises

STIQ

Sous-Traitance Industrielle Québec

WIA

Women in Aerospace

Partners and founders:



Strategic Partner of the MACH Initiative

Aéro Montréal thanks its business partners

- Fujitsu
- GE Capital
- Norton Rose Fulbright
- PricewaterhouseCoopers

Editor: Aéro Montréal

Content/coordination: Aéro Montréal

Design: Gaspard Communication Visuelle

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Cover photo: CSeries Aircraft, Courtesy of Bombardier Aerospace

ISBN 978-2-924136-01-0

Legal deposit – Bibliothèque et Archives nationales du Québec, 2014

Legal deposit – Bibliothèque et Archives Canada, 2013



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