



AÉRO MONTREAL //
AIRCRAFT sustainable AMBITION **AUDACITY**
AGILITY ACTION **AVANT-GARDE** AVIATION
ACCELERATOR **ALLIANCE** aerospace

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

COLLABORATION AND COMMITMENT TO DRIVE A GREEN AND SUSTAINABLE RECOVERY



The COVID-19 pandemic transformed the entire world. It created a new economic reality, pushed us into unknown territory, and prompted every leader to refocus their priorities and reinvent themselves. By creating new challenges, it contested the strategic framework we set for ourselves. It put into question our vision of the future.

The Québec aerospace cluster had reached record new heights in 2019.

UNITING THE STRENGTHS OF A RESILIENT SECTOR TO WEATHER THE CRISIS

Faced with the sudden storm, our industry mobilized as never before. In the very first months of the crisis, driven by a sense of urgency, the leaders of our sector joined forces to set up the Alliance for the Aerospace Recovery (AAR), a strategic committee under the direction of Aéro Montréal's Board of Directors. Its objective was clear: to develop a concrete action plan that could be quickly implemented and adapted to the sector's needs. In record time, more than 60 people came up with cross-cutting and structuring measures originating from the industry.

As the leader of this movement, Aéro Montréal made numerous representations to government authorities drawing on these remarkable efforts. By collaborating closely, and quickly, with key decision-makers, it ensured that the activities of the cluster's companies were designated as essential. Keeping companies afloat and preventing them from becoming a bottleneck in the global supply chain: the battle for the industry's survival was on.

The cluster also emphasized to these decision-makers the importance of acting quickly to prepare for the future. In response to the industry's concerns, Pierre Fitzgibbon, Minister of Economy and Innovation, announced the updating of the Québec Aerospace Strategy 2016-2026. An unprecedented collaborative effort between the government and cluster players, based on the AAR's recommendations, was then launched: the battle to stay in the race towards building the aerospace industry of tomorrow had begun.

BROADENING HORIZONS AND FOCUSING ON INNOVATION

This collective energy, which helped us stay the course throughout the struggle, is the result of a vision and a way of doing things which had already been established before the crisis.

Our strategic planning, performed with the assistance of McKinsey & Company, highlighted the importance of becoming more encompassing. In 2020, the Board of Directors opened its doors to three related sectors: start-ups, airport operations and the financial community.

Our planning also stressed the key role that greener innovation could play. We made this vision the essence of our various pillars. The focus of the recovery plans that have been initiated around the world for the aerospace sector leads me to believe that this was the right decision.

By breaking down silos, we strengthened our governance. By focusing on innovation, we created fertile ground for an active and concrete mobilization effort in times of crisis. We equipped ourselves with the right tools to get through a difficult period and these strategic choices will help us to engage in an in-depth transformation that will result in a more competitive industry within a more prosperous economy.

STARTING THE TRANSFORMATION TOWARDS A BRIGHT FUTURE

At the helm of this ship, I would like to salute the remarkable work of our President, Suzanne M. Benoit, and her team, who have guided the industry's approach, represented its interests with decision-makers, and paved the way for implementing a harmonized, strong, and sustainable recovery plan for all the cluster's players.

The crisis has set a precedent. We must seize the opportunity it offers our sector to build the aircraft of the future. The industry has considerable strengths to achieve this: proven experience; a workforce recognized worldwide; and a firm commitment to innovation that will pave the way for a green transition.

I am convinced, that, together, we will build a dynamic aerospace industry of tomorrow and position Québec as a leader in this movement.



Suzanne M. Benoit,
President
Aéro Montréal

RESILIENCE AND MOBILIZATION AT THE HEART OF THE ACTION



The year 2020 will forever remain engraved in our memories. It was the year the COVID-19 pandemic upended our lives. Affecting our health and social relations, hitting our economy and shaking our certainties, the crisis profoundly changed our society by compelling us to change our everyday habits.

To protect the public, political leaders quickly implemented dramatic measures and new rules that reduced our travel and social contacts. And while 2019 stood out as a year of record-breaking activity for the aerospace industry, 2020 saw a brutal halt in global air traffic. Restrictive measures and border closures led to disruptions in domestic and international supply chains. All over the world, many airlines struggled to survive, curtailing the purchase of new aircraft and limiting maintenance and repair needs for the foreseeable future.

MOBILIZING FOR A RECOVERY

In this unprecedented environment, the benefits of a mature industrial cluster, composed of the sector's key players, came to the fore. More than 350 volunteers swung into action, giving their time and sharing their challenges and best practices with the goal of helping the industry rebound. Such a mobilization had never been seen before!

All of these players came together in record time to develop an action plan that could be implemented quickly. Aéro Montréal's team, meanwhile, reached out to all the companies in the cluster to map out the industry's challenges and members' needs at critical moments.

This work was crucial. It allowed us to maintain a timely picture of the situation, adapted to the realities on the ground. By offering concrete proposals, Aéro Montréal played a leading role in the effort. It conducted an unprecedented advocacy campaign among provincial and federal government authorities to ensure they understood the industry's challenges and to promote numerous proposals to initiate a recovery.

Through this work, the cluster contributed to ensuring that an update of the *2021-2026 Québec Aerospace Strategy* by the Ministry of Economy and Innovation is aligned with market needs. Consulted by the Industry Strategy Council of Canada, the cluster also underscored the sector's strategic importance and represented its interests in the development of a growth plan for Canada.

In these various interventions, Aéro Montréal demonstrated our industry's boldness in reinventing itself.

SHAPING A SUSTAINABLE FUTURE

During the crisis, the players in our industry were able, against all odds, to "catch their breath" in the production race. Time stood still. Innovative ideas emerged to improve the efficiency of operations or ensure the deployment of digital capabilities.

By resulting in a dramatic drop in greenhouse gas emissions, the containment measures imposed around the world brought the issue of climate change back to the forefront. New solutions were put forward to accelerate the movement already underway to build a greener industry.

On this subject, the benefits of collaboration became more apparent than ever, with Aéro Montréal leading the way. Through industry collaboration, ideas such as the establishment of the Québec Aerospace Innovation Zone came to fruition at the end of 2020. Promising projects to meet the technological and environmental challenges could soon see the light of day in the following areas: decarbonization, electrification, autonomy, digitization, advanced manufacturing and innovative materials.

At the dawn of 2021, everyone is in agreement: to ensure a successful recovery, the industry needs to take a systemic approach that champions innovation and eco-mobility. We will succeed in shaping a promising future for Québec's aerospace industry and emerge even stronger by working together. Let's continue our journey towards a prosperous and sustainable industry!

I would like to extend my warmest thanks to the entire Aéro Montréal team, which has distinguished itself by its great agility and dedication during this particularly difficult year. I would also like to thank all of our government partners who offered us their unfailing support in an agile and proactive manner at the very beginning of the crisis.



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



Jacques Bellemare
 General Manager
Howmet Structure Systems



Richard Chénier
 General Manager
Centech



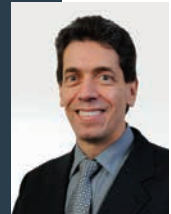
Michel Grenier
 Vice President,
 General Manager
Thales Canada, Avionique
 (1) (4)



Ugo Paniconi
 General Manager
L3Harris Technologies



Ibrahim Yimer
 Vice President (Acting),
 Transportation and
 Manufacturing Division
Conseil national de recherches Canada (CNRC)



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



Sylvain Boisvert
 General Manager
 Canada - Safran
 Engineering Services
Safran Canada
 (4)



Paul Costanzo
 Chief Executive Officer
Sonaca Montréal
 (2)



Gilles Labbé
 Executive Chairman
 of the Board
Héroux-Devtek



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



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



Joanna Boshouwers
 Vice President,
 Satellite Systems
MDA
 (2)



Maria Della Posta
 President
Pratt & Whitney Canada



Steeve Lavoie
 President
Bell Textron Canada
 (3)



Yves Proteau
 Co-President
APN



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



Hugo Brouillard
 Chief Executive Officer,
 Head of operations
Stelia Aéronautique Saint-Laurent



Pascal Désilets
 Director
École nationale d'aérotechnique (ÉNA) & General Manager Conseil technologique en aérospatiale (CTA)



Olivier Marcil
 Vice President,
 External Affairs
Bombardier



Philippe Rainville
 President and Chief
 Executive Officer
Aéroports de Montréal



Alain Aubertin
 President & CEO
Consortium for Research and Innovation in Aerospace in Quebec (CRIAQ)



Louis Brunet
 Director Business
 Development
Collins Aerospace



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



William Mateer
 Executive Leader
GE Aviation



Sylvain Savard
 Executive Board
 Member and Founder
Avianor



Philippe Balducchi
 CEO
Airbus Canada



Jacques Cabana
 President & CEO
FDC Aéro Composites
 (4)



Jean-François Dupont
 Chief Executive Officer
AV&R



Hugue Meloche
 President & CEO
Groupe Meloche
 (1)



Philippe A. Tanguy
 General Manager
Polytechnique Montréal



Janie Béïque
 Executive Vice-
 President Investments
Fonds de solidarité FTQ



David Chartrand
 Quebec Coordinator
IAMAW



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



Joris Myny
 Senior Vice President,
 Digital Industries
Siemens Canada



Ray Townsend
 Senior Manager –
 Business Operations
 and Strategy
Lockheed Martin Canada

OBSERVERS



Jonathan Gignac
 Assistant Deputy
 Minister, Direction
 générale des secteurs
 stratégiques et des
 projets économiques
*Ministère de l'Économie
 et de l'Innovation (MEI)*



Julie Insley
 Executive Director,
 Québec Region
*Innovation, Science and
 Economic Development
 Canada (ISED)*

- 1 Executive Committee
- 2 Finance and Audit Committee
- 3 Human Resources Committee
- 4 Governance, Ethics and Risk Management Committee

AÉRO MONTRÉAL'S OPERATIONAL STRUCTURE

In 2020, Aéro Montréal operated in the second year of its three-year strategic plan (2019-2021), based on two priorities:

- 1 -

A renewed vision of being the most innovative cluster in the world

- 2 -

Strong governance, based on four Pillars, illustrating the cluster's strategic drivers

These major orientations have been largely implemented over the last few years through:

- Greater inclusion on our Board of Directors with representatives from growing ecosystems
- The evolution of the RPAS and MRO Committees into working groups, reflecting the cluster's commitment to recognizing the importance of these market segments to our sector

More specifically, during 2020 we clearly demonstrated our commitment to our channels of engagement and saw the continued deployment of our strategic objectives with:

- The development of the Aerospace Innovation Zone concept as a catalyst and accelerator for the transition towards a green, sustainable and digital mobility
- The creation of the Space Committee, which has 20 participants. It aims to promote our know-how and position Québec and Canada on international projects that offer numerous opportunities related to *New Space*, space exploration and earth observation
- The establishment of the Surface Treatment & REACH Committee, with 17 participants. It aims to specifically address this aspect of our supply chain so that it does not become a drag on the competitiveness of Québec's aerospace industry

Since 2021 marks the beginning of the next strategic planning exercise, Aéro Montréal wants to maintain a flexible and pragmatic approach to defining its new orientations, based on the major objectives identified by the work of the Alliance for the Aerospace Recovery. The AAR's eco-responsibility and measures will serve as a roadmap for 2021 and inspire our future direction.

HIGHLIGHTS

- The Board 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
- To ensure greater operational efficiency, five channels of engagement were established: (1) Markets/New Niches; (2) Thematic working groups; (3) Programs and Initiatives related to the themes of the Working groups; (4) Working group Committees; and (5) Communities of Interest
- Each of the Pillars oversees one or more working group, 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 or 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

CHANNELS OF ENGAGEMENT

	GROWTH PILLAR	INNOVATION, COMPETITIVENESS AND PRODUCTIVITY PILLAR	WORKFORCE PILLAR	IMAGE, INFLUENCE AND MARKETING COMMITTEE
	Supporting business strategy, market access and industry consolidation	Coordinate the efforts of the entire Québec aerospace value chain around structuring projects to make it innovative, productive and competitive	Supporting companies and educational institutions to address the major challenges of the next generation of aerospace workers	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"> • Partnership & 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 • MRO Directory 	<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"> • #OSELAERO (promotion campaign)
WORKING GROUP COMMITTEES	<ul style="list-style-type: none"> • Defence Strategies and Measures Committee • MRO Working Group Committees: Workforce, Competitiveness and Regulation • Joint RPAS and Defence & Security Committee • ITB Committee • Space Committee 	<ul style="list-style-type: none"> • SME and Innovation Committee • Innovation Zone Committee • Global Supply Chain Summit Committee 	<ul style="list-style-type: none"> • Heritage Committee • Internship Committee • 4.0 Skills Committee • Regroupement Relève Aéro Montréal (RRAM) • Group insurance for SMEs 	<ul style="list-style-type: none"> • Image, Influence, and Marketing Committee
COMMUNITIES OF INTEREST		<ul style="list-style-type: none"> • Surface Treatment & REACH • DIMLA Maturity Matrix 		



“The unprecedented crisis that hit the industry quickly demonstrated the relevance of promoting diversification of activities within our companies. It underlined the strength of the connections and the consolidation of our expertise within the cluster and reiterated how much our collaborative work can be a major ally in adversity.”

GROWTH PILLAR

Hugue Meloche
President and Chief Executive Officer
Groupe Meloche



“Innovation must be our response to the crisis. By refocusing our objectives and vision, the COVID-19 pandemic has brought our companies’ interests together: to accelerate the transformation towards a safe, but above all, more environmentally friendly industry. In 2020, the Innovation Pillar has demonstrated its ability to accompany companies, to offer them an overall vision on the evolution of the industry in uncertain times and to stimulate their ideas so that the cluster’s players build, together, the industry of tomorrow.”

INNOVATION, COMPETITIVENESS AND PRODUCTIVITY PILLAR

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



“In the face of the pandemic, our duty was to preserve one of our industry’s greatest assets: our talent. The Workforce pillar redoubled its creativity to maintain the attractiveness of the sector, facilitate employee reclassification and encourage skills development. Our objective was clear: to mobilize teams within the various sectors of our industry and protect a highly qualified workforce and ensure that it becomes the strong link in the sector’s recovery.”

WORKFORCE PILLAR

Jacques Cabana
President and Chief Executive Officer
FDC Aéro Composites



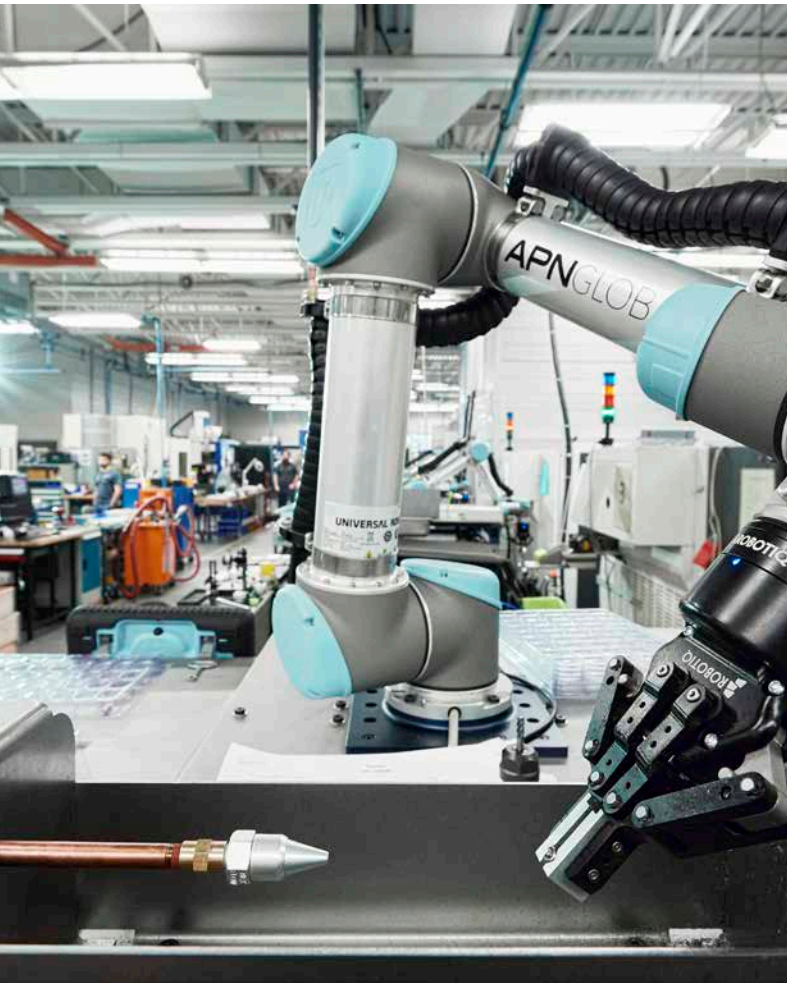
“By keeping in constant contact with cluster members, the Image, Influence and Marketing Pillar has mobilized to make the industry’s voice heard, to share its challenges and ideas for addressing them and the inspiring perspectives it envisions for transforming it. This work must continue throughout the recovery. We will have to build a strong positioning, capable of maintaining and increasing the attractiveness of our sector and its international influence.”

IMAGE, INFLUENCE AND MARKETING PILLAR

Hélène V. Gagnon
Senior Vice President, Public Affairs, Global Communications
and Corporate Social Responsibility
CAE



**GROWTH
PILLAR**



Convinced that in difficult times unity remains the best weapon to bounce back, the working group added the term “Partnerships” to its name in 2020 and placed this notion at the heart of its strategic priorities.

In collaboration with the Finance and Consolidation Task Force of the Alliance for the Aerospace Recovery, the Partnerships and Growth Working Group played a key role in sharing the measures proposed by the task force to revive the industry.

WORKING GROUP OBJECTIVES

- Significantly accelerate 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 expansion
- 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
Chief Operating Officer & Executive Vice President
Groupe DCM

“Our industry has been significantly impacted since 2019. It first suffered the 737 Max crisis for over a year and is now being hit by the COVID-19 pandemic. Never before has our manufacturing industry experienced such a crisis; it’s something we could never have imagined. In these pandemic times, which have caused an unprecedented global crisis, we must work together more than ever for the future of our industry. The Partnerships and Growth Working Group could not have been better named.”

WORKING GROUP MEMBERS 2020



Jean Blondin, President - *Abipa Canada*

Jacques Cabana, President & CEO
FDC Aéro Composites

Susan Dabrowski, Strategy, Government Relations & Business Development
LibelluleMonde

Christian Delisle, President - *Electro Kut*

Sébastien Farkas, Program Director
Techniprodec

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

Xavier Kauza, Sales Director - *Thermetco*

Joseph Laflamme, President - *Vestshell*

Hugue Meloche, President & CEO
Groupe Meloche

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

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

Jean-Charles Raillat, Chief Operating Officer & Executive Vice President - *Groupe DCM*

Stéphane Roy, Strategic Product Owner
Presagis

Eduardo Ruiz, President - *Ruiz Aerospace*

Tommy Trudel, Business Development Director
Delastek

Stéphane Turcotte, President Operations and Co-Owner - *Nétur*

CONSTANTLY MONITORING THE ECOSYSTEM’S NEEDS

Aéro Montréal reached out to companies in the cluster during key moments of the crisis. Through these personalized consultations, team members aimed to be attentive to the needs on the frontlines, to identify the challenges facing companies, and to implement useful tools to support them. The information collected was also crucial for representing the industry’s needs to government authorities and for shaping concrete measures for a recovery. This regular follow-up with members will continue in 2021.

The Aéro Montréal team also made available to members a summary of the initiatives and measures being offered by various levels of government to help them get through the crisis.

IMPLEMENTING A FAST-TRACK PROCESS TO HELP “NON-ESSENTIAL” COMPANIES RESUME ACTIVITIES

In April 2020, restrictive measures forced many companies to halt activities deemed non-essential. Aéro Montréal mobilized to implement an accelerated process to help companies affected by these measures. Through this special operation, Aéro Montréal established a direct channel of communication and a *modus operandi* with senior government authorities. Targeted authorizations issued by the government to allow the resumption of activities, as well as guidelines on best health practices, were sent to companies within a maximum of one week. A total of 31 companies benefited from this initiative, which helped them maintain operations and ensured that Québec companies were not a bottleneck in global supply chains.

SUPPORTING COMPANIES TO SET UP PROTECTIVE MEASURES

To help companies implement protective measures, Aéro Montréal mobilized as never before to offer a batch of 10,000 reusable masks free or charge to manufacturing SMEs in the aerospace sector. This project was part of a wider effort to support local companies in related sectors. It was implemented with the help of mmode, the Metropolitan Fashion Cluster, and the collaboration of Montréal coat supplier Quartz Co., which modified its production line to manufacture protective textile equipment.



// ENSURING THE STRATEGIC POSITIONING OF THE SUPPLY CHAIN INTERNATIONALLY

IDENTIFYING QUÉBEC'S PULL FACTORS IN TERMS OF GREEN AND SUSTAINABLE ENERGY

At a time when many countries are leveraging their sectoral recovery plans to accelerate the transition to a sustainable industry, the Partnerships and Growth Working Group initiated a study to identify Québec's main draws in terms of green and sustainable energy. By highlighting Québec's strengths in natural resources and green energy, the working group wants to promote the diversification of Québec companies in promising sectors while encouraging multi-sectoral collaborations.

DEFINING FINANCIAL RATIOS FOR MACHINING SMES IN THE AEROSPACE SECTOR

Two factors led to a study on the financial ratios for machining SMEs in the aerospace sector. The first stems from the Partnerships and Growth Working Group's observation that there is a certain lack of alignment between the financial ratios used by financial institutions and the real situation of companies in the sector. The second is related to a demand and an interest on the part of SMEs to be able to compare their financial results with those of their peers.

Accordingly, Aéro Montréal launched a study among a sample of SMEs in the machining sector. The confidential study defined the financial ratios for this segment and performed a global comparative analysis that was customized for each company. Following the success and very positive feedback from participating companies, this exercise will be repeated and extended to other segments in 2021.

// FACILITATING PROGRAMS AND INITIATIVES TO MEET THE INDUSTRY'S NEEDS

STRENGTHENING COLLABORATION AMONG INDUSTRY PLAYERS THROUGH ACCELERATOR 360°

By offering tools and expert guidance to accelerate industry consolidation, Accelerator 360° has become an indispensable program for players in the Québec aerospace industry.



PROGRAM	ACCELERATOR 360°
CATEGORY	Commercialization and Consolidation
YEAR OF CREATION	2018
OBJECTIVE	To support the growth of Québec SMEs through internationalization and consolidation actions
PARTNER	Ministry of Economy and Innovation
NUMBER OF PARTICIPANTS	Two cohorts totalling 25 companies
FUNDING	A \$7.2 million initiative over 5 years, including a \$5 million public contribution

➤ **Results 2020**

- Continuation of Accelerator 360° monthly meetings and participant training
- Support of a second consolidation by the program
- Weekly sharing of briefs focusing on current aerospace news
- Completion of a study on financial ratios

ENCOURAGING THE INTEGRATION OF DISRUPTIVE TECHNOLOGIES THROUGH THE STARTAÉRO 360° INITIATIVE

By facilitating the integration and commercialization of breakthrough technologies, the StartAéro 360° initiative has emerged as a valuable tool for strengthening the Québec aerospace supply chain.



INITIATIVE	STARTAÉRO 360°
CATEGORY	Commercialization of Innovation
YEAR OF CREATION	2019
OBJECTIVE	To foster the integration and commercialization of breakthrough technologies in the aerospace supply chain by carrying out industrial proofs of concept
PARTNER	Canada Economic Development for Québec Regions
NUMBER OF PARTICIPANTS	21 companies recruited
FUNDING	A \$4.4 million initiative over 3 years, including a \$3 million public contribution.

➤ **Results 2020**

- 16 training courses
- Participation in 12 local and international missions
- Development of the StartAéro 360° portal to actively monitor business opportunities and implement collaborative projects: 318 members and more than 400 business opportunities posted
- 7 support projects in progress

ESTABLISHING CONTINUOUS SUPPORT FOR TECHNOLOGY START-UPS IN COLLABORATION WITH CENTECH

A productive collaboration between CENTECH and the StartAéro 360° program continued in 2020. This close working relationship brought together all the players involved in supporting start-ups and established continuous support for technological start-ups whose solutions could be applied to the aerospace sector. Initially incubated at CENTECH, they can then join the StartAéro 360° program to commercialize the technology developed.

// RAISING THE INTERNATIONAL VISIBILITY OF QUÉBEC'S AEROSPACE ECOSYSTEM



PARTICIPATION IN THE ADVANCED TRANSPORTATION MANUFACTURING SUMMIT (ATMS) EVENT FEBRUARY 4-6, 2020, TORONTO

To monitor technology developments and enhance knowledge of the ecosystem, the StartAéro 360° initiative supported four companies in attending the ATMS event. The event, which for the first time combined players from the aerospace and automotive industries (OEMs, suppliers, manufacturers, service and product providers) around a B2B forum, took place over four days and featured company visits, conferences and business meetings.



// Members of the StartAéro 360° initiative, OVA, SII Canada, Solaxis and JitBase, were helped to prepare for B2B meetings and put in contact with many companies.

// MAIN PROJECTS FOR 2021

In 2021, the Partnerships and Growth Working Group will continue to set up a Space Committee to represent Québec's space ecosystem and implement concerted actions to remain competitive internationally.

The working group will also carry out a second phase of the study on financial ratios. This will lead to concrete recommendations for the aerospace sector by diversifying the sample of companies participating in the study.

The working group will also pursue the development of Alliance for the Aerospace Recovery measures and focus on the implementation of projects to promote the consolidation and financing of companies, diversification and the expansion of promising niche markets. This will be achieved by implementing AAR measures (Growth Fund/Factoring); increasing the Accelerator 360° program's support for consolidation; preserving the start-up ecosystem by strengthening partnerships through StartAéro 360° and by launching the Space Committee.



The year 2020 brought its share of challenges and underscored the importance of diversifying business activities. While containment measures and travel restrictions brought several sectors of the industry to a standstill, defence and security activities were maintained, highlighting the importance for companies to open up to diversified markets.

More than CAD \$40 billion in contracts will be awarded to this sector by the Canadian government within the next three years. Defence and Security companies will therefore have to position themselves on major Department of National Defence acquisition projects over the next 12 to 18 months.

At a time when Québec and its companies need to take advantage of these Canadian and global business opportunities, the Defence and Security Working Group is a valuable grouping that will help to position Québec industry at the centre of this market.

WORKING GROUP OBJECTIVES

- Improve the competitiveness of the Québec industry in the aerospace defence market
- Identify, coordinate and monitor initiatives designed to structure projects in support of strategic recommendations
- Ensure that the defence sector fosters the recovery of companies by supporting their positioning on major acquisition projects that will be launched soon, and by issuing recommendations so that the Industrial and Technological Benefits (ITB) policy further benefits Canadian companies
- Represent the industry to governments on strategic issues regarding major equipment acquisition projects



Ugo Paniconi, Working Group President
General Manager
L3Harris Technologies

"Despite the pandemic, it is important for the industry to showcase the benefits of the Canadian market and invest in the defence and security industry. On the defence side, the Royal Canadian Air Force is undergoing one of the largest recapitalization efforts in recent years and I hope that these initiatives will provide many of you with the opportunity to actively participate."

WORKING
GROUP
MEMBERS
2020

Alain Beaulieu, Technical Sales Manager
Mannarino

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

Philippe Bisailon, Director, Business Development, Surveillance & Intelligence - *MDA*

Patrick Bouchard, , Advisor, Land and Maritime Transport - *Ministère de l'Économie et de l'Innovation (MEI)*

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

Badr Boushel, Sales & Business Development Manager - *Amrikart*

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

Phil Cole, Vice President Business Development
Marinvent Corporation

François Cyr, Vice President Business Development & Marketing - *PCM Innovation*

Susan Dabrowski, Strategy, Government Relations & Business Development
LibelluleMonde

Sylvain Decoste, Deputy Director, Industrial Continuous Education
École nationale d'aérotechnique (ÉNA)

William De Keiser, Director, Niche of Excellence in Civil and Commercial RPAS
UAS Center of Excellence

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

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

David Ferris, Vice President Business Development - *LSI*

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

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

Fabrice Garro, CEO, Canada - *AKKA*

Manon Gaudet, Director, Aviation Cyber Security
IATA

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

Xavier Kauza, Sales Director - *Thermetco*

Jarred Knecht, President - *Promark Électroniques*

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

Felix Leblanc, Sales and Partnerships
OVA

Lorenzo Marandola, President
Technologie M1 Composites

Vincent Marcotte, Director, Sales & Program Management - *Héroux-Devtek*

Jessica Martel, Director, Governmental Affairs
Canada Economic Development for Quebec Regions (CED)

Karine Martinez, Director, Business Development
FDC Aéro Composites

Paul Meyran, Student - *RRAM*

Ugo Paniconi, General Manager
L3Harris Technologies

Denis Pelletier, Director, Business Development
CAE

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 (NRC)

Sylvain Savard, Executive Board Member and Founder - *Avianor*

Alain Thilloy, Director Systems
MTLS Aerostructure

Ray Townsend, Senior Manager – Business Operations and Strategy
Lockheed Martin Canada

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

Erica Zoia, Business Development Director
InnoSecur



“In 2020, Aéro Montréal led efforts with various levels of government to ensure key segments of the aeronautics industry were recognized as an essential service, allowing them to maintain support to first responders and the Canadian Armed Forces during a pandemic. Aéro Montréal's leadership was also a catalyst for implementing and sharing preventive measures to benefit the industry and the Québec public.”

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

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 Ministry of Economy and 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 2020, SDQuébec had more than 581 member companies (53 more than in 2019) and 4,432 business opportunities were posted (1,406 more than in 2019).

Other activities, such as webinars and training, are also presented by SDQuébec. The Aéro Montréal team is continuing its collaboration with McGill University to develop intelligent algorithms that will improve the efficiency and quality of defence-related content searches.

In 2020, Aéro Montréal also set up a new opportunity monitoring program for SDQuébec members in connection with the American defence market. Among other things, this program enables several Québec companies to explore opportunities in the U.S. defence market, representing more than 30 business opportunities.

A VIRTUAL EDITION OF THE SYMPOSIUM ON THE CANADIAN DEFENCE AND SECURITY MARKET

The 5th edition of the Symposium on the Canadian Defence and Security Market was held on October 19, 2020 under the theme: *Canadian Defence and Security Market: Perspectives and New Realities*.

Initiated by Canada Economic Development for Québec Regions, the event was held in collaboration with Sous-Traitance Industrielle Québec (STIQ) and Aéro Montréal. The Symposium provided an opportunity to take stock of major projects under development or to review opportunities for accessing U.S. and foreign markets and the rules that govern them. A total of 380 people gathered virtually to attend the conferences and participate in the many working groups and B2B meetings.



PROVIDING DEFENCE BUSINESS DEVELOPMENT TRAINING IN THE CANADIAN AND U.S. MARKETS

In the current context, companies are realizing that diversification into new markets allows them to limit risks and take advantage of new opportunities with high added value.

While the Canadian and U.S. defence markets represent an avenue of diversification for cluster players, integration into the value chain is not easy.

To meet this challenge, Aéro Montréal and its partners organized training sessions to support cluster members who wish to penetrate these two markets.



- For the Canadian defence market, Aéro Montréal partnered with Cirrus Research Associates to offer training comprised of five virtual sessions over four days. Thanks to the support of the Ministry of Economy and Innovation and Services Québec, the training brought together fifteen participants from ten companies.



- For the U.S. defence market, Aéro Montréal partnered with McCarter & English, LLP and LSI. Developed in 2020, the training was delivered in January 2021 and brought together fourteen participants from eight companies. Including workshops and coaching, topics covered included the basics of accessing the U.S. market, business relations with the U.S. government, regulations, export controls, foreign investment in the U.S., intellectual property, and cyber security obligations.



IMAGINING A NEW EVENT: MRO AND DEFENCE AND SECURITY DAY

MRO and Defence and Security Day was held on December 16 as part of International Aerospace Week - Montréal 2020, which took place from December 14 to 17, 2020. It offered a unique opportunity for companies to take stock of the industry's situation, share a vision of the future, and come up with concrete solutions to revitalize the sector.

This event, which welcomed more than 350 participants and 22 speakers, presented a detailed overview of defence programs and the sector's needs in the coming years in terms of innovation, disruptive technologies and cyber security.

The program featured numerous conferences on business development in the Canadian defence sector and the export market.

B2B/B2G sessions were held throughout the day and provided an opportunity to meet with prime contractors and Government of Canada representatives with regard to major upcoming procurement projects.

// MAIN PROJECTS FOR 2021

The Defence and Security Working Group will continue to support cluster members in their diversification plans in 2021 since many growth opportunities are within their reach. In particular, the working group will focus on:

• QUÉBEC DEFENCE AND SECURITY INDUSTRIES COMMUNITY

Aéro Montréal, InnoSécur, STIQ and In-Sec-M propose to form a grouping of Québec's defence and security industries to bring together companies from different sectors and mobilize them through a common front. This grouping would facilitate networking between companies from different sectors that intersect in defence and security. Moreover, this grouping would make it possible to develop a common strategy, to facilitate access to the defence and security sector, and to represent the Québec industry in a unified and coordinated manner.

• STUDY ON ATTRACTING INTERNATIONAL MANDATES

Aéro Montréal plans to conduct a study to identify the "gaps" between the investment incentives related to the attraction of international mandates for defence contracts in Canada vs. other jurisdictions and to develop concrete measures to fill these "gaps". This would ensure the maintenance or expansion of high value-added activities (R&D, productivity increase projects) in Québec.



With border closures and a slowdown in air transport activities, many companies operating in maintenance, repair and overhaul (MRO) faced numerous challenges in 2020.

Confronted by this difficult situation, the MRO Working Group played a role in listening to the challenges and needs of companies in the sector and actively representing their interests with government authorities and the industry. It redoubled its efforts to strengthen the strategic positioning of the sector.

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



Matthieu Duhaime, Working Group President
President & Chief Operating Officer
Avianor

“The MRO sector in Québec was severely shaken by the pandemic and experienced a dramatic decline in activity. To ensure a rapid recovery, it is essential for Québec companies operating in MRO to position themselves well in the markets, especially by promoting the diversification of clientele and the products and services being offered. Québec’s MRO sector will have to overcome major challenges in the coming years. The workforce will certainly remain one of the biggest of these, especially since we have gone from a severe shortage to a risk of exodus to other areas. It will be crucial to carry out concerted actions to ensure the sector’s growth and remain competitive, notably by creating an ecosystem of collaboration and by promoting strategic ties and complementarity.”

WORKING GROUP MEMBERS 2020



Jean-Pierre Bastien, Executive Vice President
Pole Air Aviation

Sabino Buontempo, Director of Operations
Rolls-Royce Canada

Philippe Burton, Partner - *Leaders International*

Julie Cantin, Director, Human Resources
Starlink Aviation

Arnaud Cautru, Director of Finance - *AJW Technique*

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

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

Matthieu Duhaime, President & Chief Operating Officer - *Avianor*

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

Toby Gauld, Founder and President - *Optima Aéro*

Eric Gendron, Director of Operations
L3Harris Technologies

Stéphane Germain, Director of Operations
Execaire

Sébastien Godart, Director Business Development
Altitude Aerospace

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

Francis Labonté, Technical & Quality Director
Luxia Innovation

Denis Mailloux, Quality Director/ PRM
CanRep

Guillermo Moyano, International Trade Advisor
Investissement Québec

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

Yves Patrice, Sales Director - *Lufthansa Technik*

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

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

Sylvain Savard, Executive Board Member and Founder - *Avianor*

Wayne Tessier, Executive director - *AURAY Sourcing*

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

// WORKING GROUP COMMITTEES

- The Workforce Committee's mandate is to develop strategies to attract and retain talent 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

MRO WORKING COMMITTEES

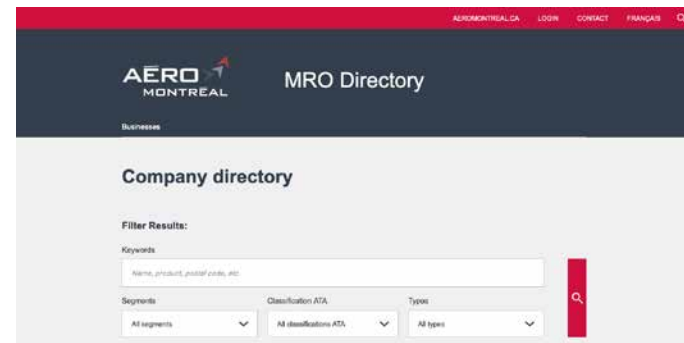
	WORKFORCE	COMPETITIVENESS	REGULATION
LEADER	Raise awareness of MRO trades and optimize access to the workforce	Identify and promote the capabilities of companies in the sector	Modernize regulations so that they do not hinder competitiveness
	Wayne Tessier <i>Auray Sourcing</i>	Patrick Phillips <i>Tulmar</i>	Michel Gagnon <i>Pole Air Aviation</i>
PARTICIPANTS	Denis Mailloux , <i>CanRep</i> Geneviève Dalcourt , <i>Cégep Édouard-Montpetit</i> Jean-Marc Dufour , <i>AQTA</i> Jean-Pierre Bastien , <i>Pole Air Aviation</i> Jean Trépanier , <i>Air Transat</i>	Arnaud Cautru , <i>AJW Technique</i> Benjamin Hamel , <i>SITA OnAir</i> Francis Labonté , <i>Luxia Innovation</i> Michel Gagnon , <i>Pole Air Aviation</i> Sabino Buontempo , <i>Rolls-Royce Canada</i> Toby Gauld , <i>Optima Aero</i>	Denis Mailloux , <i>CanRep</i> Jean-Pierre Bastien , <i>Pole Air Aviation</i> Jean-Marc Dufour , <i>AQTA</i> Jean Trépanier , <i>Air Transat</i> Sylvain Savard , <i>Avianor</i>

// MAIN WORKING GROUP ACHIEVEMENTS

COMPILING A DIRECTORY OF MRO CAPABILITIES IN QUÉBEC

In 2020, the MRO Working Group worked on the development and implementation of a directory of MRO capabilities. The tool's objective is to promote collaboration between complementary companies through a precise mapping of their capabilities. It also aims to raise the visibility of Québec's strengths and competencies and attract new contracts in Québec. Among other things, this directory will help to fill gaps in the value chain.

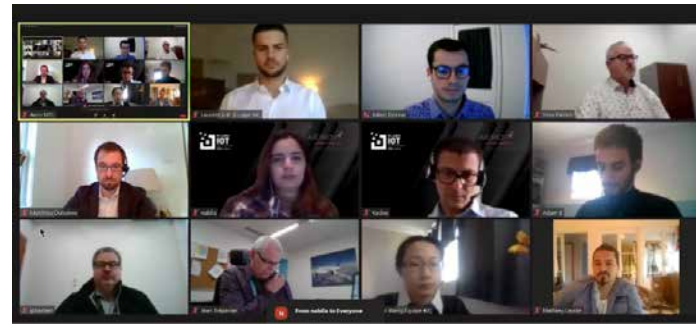
A group of experts was formed by the MRO Working Group's Competitiveness sub-committee to identify the sections to be included in the directory and ensure a detailed analysis of the sector's activities. The directory will be issued in 2021.



IMAGINING A NEW EVENT: MRO AND DEFENCE AND SECURITY DAY

MRO and Defence and Security Day took place on December 16, 2020. This event enabled companies to take stock of the industry's situation, share a vision for the future, and come up with concrete solutions to revitalize the sector.

The MRO component brought together 17 renowned speakers who addressed many important subjects such as industry trends and ways to meet these challenges through new and more collaborative approaches.



CASE STUDY COMPETITION

A case study competition on the theme of MRO was held during International Aerospace Week - Montréal 2020. Students were invited to come up with a process for ensuring better tooling control during aircraft maintenance operations.

The case study aimed to introduce the MRO sector to a large student audience and highlight the many job opportunities in this sector.

The grand finale was held on December 16, 2020. Four teams presented their proposals virtually to a large audience attending MRO and Defence and Security Day and the Vitrines 2020 event.

Thanks to the Canadian Mobility and Aerospace Institute (CMAI), a partner in the competition, the winning team won a gift certificate and a company tour, when health measures permit.

// MAIN PROJECTS FOR 2021

In view of the crisis, the MRO Working Group intends to prioritize a revision of the mandates of the Workforce, Competitiveness and Regulation committees to be able to implement concrete actions adapted to new market needs.

2021 will also mark the official launch of the MRO capabilities directory, a tool that will be used by all players in the sector.



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.

According to current forecasts, production in the RPAS sector is expected to more than triple in the coming years, climbing to US\$25 billion in 2025¹. The working group wants to position Québec as a key player in this growing industry.

In 2020, it continued its work of representing the initiatives of its members and the community to government authorities. In fact, Aéro Montréal co-signed a letter urging the federal government to base the future fleet of military drones in Bagotville, Québec.

In addition to regular meetings, working group members also continued to work on renewing the mandate of the Civil and Commercial RPAS Niche of Excellence with the objective of helping companies showcase Québec's significant capabilities.

¹ <https://www.economie.gouv.qc.ca/bibliotheques/creneaux/drones-civils-et-commerciaux/>

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
- Work on the strategic positioning and representation of the Québec RPAS sector
- Support the growth of the Québec RPAS sector internationally
- Promote the commercialization of solutions developed in Québec



Marc Moffatt, Working Group President
Strategic advisor
UAS Cluster of Excellence

"The Unmanned Aircraft Systems (UAS) sector is one of the most active niches in the aerospace industry and will continue to grow exponentially in the coming years. I would like to commend the enthusiasm and energy of the working group's members, who are continuing to mobilize the key players in Québec's aerospace sector. Like everywhere else, the pandemic has led us to review the way we work. This is underscoring the innovative role that our working group can play in Québec's economic recovery. It will ensure that the province, with the support of Aéro Montréal, continues to make its mark and demonstrate its know-how in this highly competitive sector, where many provinces, U.S. states and countries are seeking to position themselves."

WORKING GROUP MEMBERS 2020



Hélène Beaugrand Champagne, Project Manager
Comité sectoriel de main-d'œuvre en aérospatiale (CAMAQ)

Sylvain Bourque, Civil Aviation Safety Inspector, RPAS Task Force, BVLOS team
Transports Canada

Nicholas Brodeur, Technical Staff Specialist
Bell Textron Canada

Pascal Chiva-Bernard, President & Cofounder
ARA Robotique

Phil Cole, Vice President Business Development
Marinvent Corporation

William De Keiser, Director, Niche of Excellence in Civil and Commercial RPAS
UAS Center of Excellence

Louis Deschênes, Assistant to Academic Dean
Cégep Édouard-Montpetit

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

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

Jean-Sébastien Jetté, Aviation Safety Advisor
Hydro-Québec

Enrick Laflamme, Cofounder - *Laflamme Aero*

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

Sébastien Long, Sales Manager, Canada
Microdrones

Marc Moffatt, Strategic advisor
UAS Cluster of Excellence

David Neveu, Project Manager - *NGC Aérospatiale*

Laurent Pieraut, Chief Executive Officer - *CS Canada*

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

Stéphane Roy, Strategic Product Owner - *Presagis*

Abdo Shabah, Founder & CEO - *Projet Humanitas*

Marc St-Georges, Senior Product Planning Manager - *Bombardier*

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

Marc-André Talbot, Director, Research & Development - *Thales Canada, Avionique*

Mathieu Trudelle, Senior advisor, Industrial and Technological Benefits – Aerospace sector
Canada Economic Development for Quebec Regions (CED)

John Valley, Deputy Director - *Exo Drone*

Charles Vidal, Aerial Robotics Project Lead
National Research Council Canada (NRC)

Louis Xavier, Technical Lead
Thales Canada, Avionics

Erica Zoia, Business Development Director
InnoSecur

// MAIN WORKING GROUP ACHIEVEMENTS

MOBILIZING THE STRENGTHS OF THE RPAS SECTOR

2020 marked the beginning of work and reflections on the implementation of a mobilizing approach that would increase the sector's strategic projects and facilitate the demonstration of Québec technologies in the RPAS sector. The objective of this approach is to organize groups of companies in the sector around the needs of end users while leveraging these technologies and increasing private and public investment. In addition, the working group aims to align the need for operational demonstrators with existing financial and operational support. The first phase of the study and recommendation will be completed in the spring of 2021 and a strategic committee will then be set up to begin the next steps.

"The Working Group's meetings are an ideal opportunity to discuss the latest news in the RPAS sector with the various players in Québec and to discuss strategies that can be shared to promote our Québec innovations."

Enrick Laflamme, Cofounder
Laflamme Aero

"Business collaboration is essential and fundamental to the development of effective regulations that fully reflect the reality and needs of the industry. The RPAS Working Group is a platform that allows us to stay attentive to the industry."

Sylvain Bourque, Civil Aviation Safety Inspector, RPAS Task Force, BVLOS team
Transport Canada

FOSTERING COLLABORATIONS BETWEEN THE RPAS AND SECURITY AND DEFENCE SECTORS

The RPAS and Defence and Security working groups set up a joint committee to monitor developments in Canada's Department of National Defence procurement program: the RPAS project.

This collaboration allows for the exchange of key information, mobilizes the community, and maximizes the positioning of SMEs on RPAS acquisition projects. By identifying the challenges and needs of companies in the sector, the committee wants to support the integration of Québec companies into defence and security sector projects. This committee has 16 members from both working groups.

PROMOTING THE KNOW-HOW OF COMPANIES IN THE RPAS SECTOR

The RPAS Québec Portal (<https://rpasquebec.ca/fr>) was set up in 2019 to facilitate exchanges and highlight the skills and know-how of companies in the sector. An exceptional reference tool, the RPAS Québec Portal is first and foremost a one-stop shop where key players from Québec, Canada and abroad can meet. To date, 92 companies are present on the portal. The working group intends to broaden the portal's mandate in 2021 to include calls for tenders from the industry.



// OVERSEAS MISSIONS

AUVSI XPONENTIAL 2020

Aéro Montréal, accompanied by a delegation of Québec companies led by Investissement Québec International, participated in the first virtual edition of AUVSI Xponential. The event, held from October 5 to 8, 2020, featured more than a dozen conferences and 60 working sessions. It is one of the largest gatherings in the industry and offers networking opportunities, updates on new products and best practices in the sector, and reviews of the latest regulatory developments. More than 10 companies from Aéro Montréal's RPAS Working Group, some of which were supported by the StartAéro 360° program, participated this year. More than 200 companies visited the Québec Pavilion, helping to raise the profile of our expertise, which is recognized and admired worldwide.

Aéro Montréal's presence at the Québec Pavilion was an opportunity to represent its members active in the RPAS sector and highlight actions of the working groups and support programs such as StartAéro 360° and the Accelerator 360° program.



UNMANNED SYSTEMS CANADA

Unmanned Systems Canada's annual conference is a must-attend event for the Canadian RPAS industry. It is the ideal platform for Transport Canada and NAV Canada to share their strategic directions and upcoming projects. RPAS Working Group companies participated this year, virtually, to align their projects with the orientations of these organizations and to promote their new initiatives.



A project developed by Iris Automation, the UAS Centre of Excellence (CED) and MVT Geo-Solutions was presented during the event. Through a series of operations, the project aims to obtain a Special Flight Operations Certificate (SFOC) from Transport Canada for the use of the Casia on-board detection and avoidance system designed by Iris Automation. Inspection tests of the commercial infrastructure of linear power lines will be conducted as part of this SFOC. The objective is to develop training concepts and operations manuals to improve the skills of Québec operators, develop expertise, and position the UAS-CED as a benchmark in Beyond Visual Line-of-Sight (BVLOS).

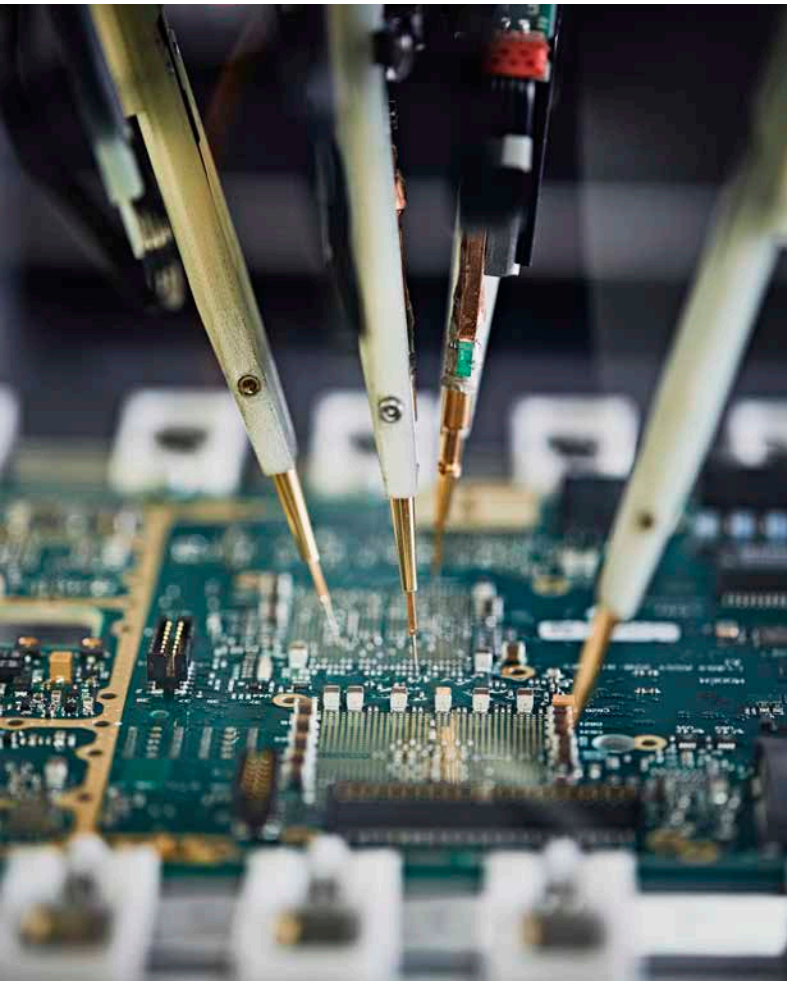
// MAIN PROJECTS FOR 2021

The RPAS Working Group will continue to strengthen the sector's position within the Québec ecosystem and implement initiatives to promote Québec's expertise on a national and international scale. The working group intends to:

- Ensure the positioning of a brand and a RPAS Québec ecosystem by collaborating with all the players in the sector to promote the know-how of the Québec industry
- Complete the first phase of the consortium to create an integrated and sustainable Québec ecosystem
- Set up collaborative projects to create links between developers and users to facilitate the integration of technologies in RPAS operations



INNOVATION, COMPETITIVENESS
AND PRODUCTIVITY
PILLAR



The Green and Intelligent Supply Chain Working Group was very active in 2020 as companies in the aerospace cluster had to deal with the many challenges posed by the COVID-19 pandemic. The sector had to be resilient and find ways to reinvent itself, diversify and innovate. The working group deployed numerous initiatives to support Québec supply chain companies throughout the year so that they can emerge even stronger when the industry rebounds.

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



Louis Marc Pinard, Working Group President
Chief Operating Officer
AP&C

“All the players in the supply chain felt the full impact of the changes on the industry caused by the pandemic in 2020. While this is undoubtedly a situation of unprecedented challenges, it is forcing us to reflect and adapt. For those who will be able to take advantage of it, it will be an opportunity to become more efficient and better adapted to tomorrow’s market and its dynamics.”

WORKING GROUP MEMBERS 2020



Marc Bigras, Vice President & COO
Groupe Meloche

Jacques Bonnaventure, Supply Chain Expert,
Consultant

Francis Cloutier, Supply Chain Director
Bombardier

François Cyr, Vice President Business Development
& Marketing - PCM Innovation

Jacques Dodier, Advanced Sourcing
Senior Manager - Pratt & Whitney Canada

Éric Faucher, President & CEO
Hutchinson Aéronautique et Industrie

Annie Christa-Lee Fortier, Head of Supply Chain
Management - Rolls-Royce Canada

Michael F. Messiha, Senior Manager, Global
Strategic Sourcing - CAE

Michael Palarchio, Manager, Procurement
Bombardier

Louis Marc Pinard, Chief Operating Officer - AP&C

Jean Proteau, Co-President - APN

Danielle Savage, Senior Purchasing Manager
Bell Textron Canada

// WORKING GROUP INITIATIVES:



INITIATIVE	MACH
CATEGORY	Operational Efficiency
YEAR OF CREATION	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

2020 Results

- 5 active cohorts
- 68 companies supported under the Initiative
- 949 improvement projects completed or underway to date

“MACH has laid the foundations for all of our innovation initiatives, past, present and future. The foundations must be strong for a company to be able to innovate and implement technologies related to Industry 4.0. People are at the core of a company’s foundations. Accordingly, the various MACH initiatives and the support we have received over the past five years have enabled us to develop our processes and

our teams to implement innovative technologies, and our managers to effectively manage the related changes. We are very grateful to Aéro Montréal for implementing this program and for their support over its five-year duration.”

Dany Dumont, Vice President, Innovation
Produits Intégrés AVIOR



MACH FAB 4.0

Propulser l'usine du futur
Towards the factory of the future

INITIATIVE	MACH FAB 4.0
CATEGORY	Operational efficiency
YEAR OF CREATION	2016
OBJECTIVE	Fostering the integration of digital and advanced manufacturing technologies within participating SMEs.
PARTNERS	STIQ AÉROÉTS Ministry of Economy and Innovation
FUNDING	A \$19 million initiative, including \$9.5 million in public funds

2020 Results

- 47 improvement cycles in progress or completed
- 109 projects in progress or completed
- 7 companies participating in collaborative initiatives
- 37 SMEs active in the program

“MACH FAB 4.0 offered us, throughout the program, mentoring and training drawing on the experience of the Aéro Montréal team. By also allowing us to share ideas with other players who had experienced similar situations, MACH FAB 4.0 helped us to capitalize on the projects and make them easier to implement.”

Éric Ledoux, President
Groupe DCM

// MAIN WORKING GROUP ACHIEVEMENTS

MTESS SUPPORTS THE MACH PROGRAM

During a ceremony held in March 2020 at the École de technologie supérieure, the Minister of Labour, Employment and Social Solidarity (MTESS), Mr. Jean Boulet, confirmed his department's support for Phase 3 of Aéro Montréal's MACH program in the amount of \$1.85 million. Created to promote collaboration and innovation within the supply chain, the MACH program also aims to improve the performance and competitiveness of suppliers. By providing this funding, the government wants to strengthen its support for SMEs and the training of 1,500 workers.



// Speech by Minister Jean Boulet

OFFERING A VIRTUAL WORKSHOP TO MACH FAB 4.0 MEMBERS

In March 2020, the Green and Intelligent Supply Chain Working Group held a virtual workshop on strategic and digital planning within organizations. Nearly 20 companies in the MACH FAB 4.0 initiative took part in this activity.

SUPPORTING MANUFACTURING COMPANIES IN THE DEPLOYMENT OF HEALTH MEASURES

Companies had to quickly implement stringent health measures to limit the spread of the COVID-19 virus, protect employee safety and maintain some of their operations. To assist them in this process, Aéro Montréal, in collaboration with Intelligence Industrielle, developed and deployed a dynamic digital signage solution for manufacturing companies. The objective of this turnkey solution, funded by the Government of Québec under the MACH FAB 4.0 initiative, was to enable companies to manage employee movement in common areas, in real time, and avoid the risk of spreading the virus. It makes it possible to call up, at all times, safety measures applicable within a company.

Signalisation digitale et dynamique pour les usines

Une solution clés en main pour aider à une reprise progressive des activités. Elle permet de gérer en temps réel l'achalandage des employés et elle affiche les dernières mesures de distanciation sociale en vigueur au sein de votre usine.



LAUNCHING A STUDY ON FINISHING AND SURFACE TREATMENT CAPABILITIES IN QUÉBEC

In September 2020, Aéro Montréal began a study to define current and future finishing and surface treatment capabilities within Québec's supply chain to better meet the needs of the Québec and global aerospace industry. During the last quarter of 2020, some 30 interviews were conducted with industry players in Québec and Europe, where certain actions are being taken to address similar issues. The study's results will be unveiled at Aéro Montréal's next Global Supply Chain Summit in 2021 and an action plan will be developed by the Surface Treatment Community of Interest of the Green and Intelligent Supply Chain Working Group.

STUDYING SUPPLY CHAIN TRANSFORMATIONS - LARGE MANUFACTURERS VISION STUDY

In November 2020, Aéro Montréal mandated the firm AeroDynamic to conduct a study entitled Large Manufacturers Vision. The study's objective is to highlight transformations in the supply chain management strategies of local and international OEMs, as well as the major technological trends for 2025-2035. The study's results will be presented at the Global Supply Chain Summit in 2021.



AVIATION FORUM HAMBURG 2020

Aviation Forum Hamburg, like many other events around the world, had to adopt a new format in 2020 due to the global pandemic. Held on a virtual basis in November, the forum aimed to bring companies in the global supply chain closer together around topics dealing with innovation. This new edition was attended by 1,500 participants from all over the world. Thanks to a collaboration agreement with the event's organizers, Aéro Montréal supported the presence of 22 Québec companies.



// MAIN PROJECTS FOR 2021

The Green and Intelligent Supply Chain Working Group will continue its energetic mobilization in 2021 and has several projects planned. These include:

- Identification and development of an action plan based on the results of the study on finishing and surface treatment capabilities in Québec
- Identification and development of an action plan based on the results of the Large Manufacturers Vision Study on procurement and technology trends among global OEMs
- The need to address customer-supplier interconnection to increase transparency in the sharing of information throughout the supply chain
- A study on the resilience of supply chains in the face of extreme risks
- Possible establishment of a strategic group for the creation of a data trust



Created in 2006, the Innovation Monitoring and Strategy 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 start-ups.

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 industry needs and trends and seek to promote accelerated commercialization of local innovations



Fassi Kafyeke, Working Group President
Fellow, Research, Innovation and Collaborations
Bombardier

"2020 was a remarkable year, with the emergence of new breakthrough technologies driven by the fight against climate change. In the midst of the pandemic, the Innovation Monitoring and Strategy Working Group worked to identify major global trends and the most promising technologies, and to demonstrate that we can succeed together with our new aerospace strategy and a vibrant concept of the Innovation zone."

WORKING GROUP MEMBERS 2020

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

Francis Archambault, General Manager *Centre technologique en aérospatiale (CTA)*

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

Alain Aubertin, President & CEO *Consortium for Research and Innovation in Aerospace in Quebec (CRIAQ)*

Sylvain Boisvert, General Manager Canada *Safran Engineering Services, Safran Canada*

Louis Brunet, Director Business Development *Collins Aerospace*

Mikaël Cardinal, Vice President, E-Aviation / Organ Delivery Systems *Unither Bioélectronique*

Patrick Champagne, Vice President, Corporate Strategy and Government Relations *CMC Électronique*

Cyrille Chanal, Chief Executive Officer *FusiA Groupe*

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

Jean Colpin, Industrial Advisor, MIAE *Université McGill*

Susan Dabrowski, Strategy, Government Relations & Business Development *LibelluleMonde*

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

Michel Dion, Manager, Innovation *Bell Textron Canada*

François Garnier, Professor, Mechanical Engineering Department, Director AEROETS *École de technologie supérieure (ÉTS)*

Fassi Kafyeke, Fellow, Research, Innovation and Collaborations - *Bombardier*

Denis Lacroix, Scientific Advisor *Centre technologique en aérospatiale (CTA)*

Jacques Lambert, Advisor, Direction de la recherche collaborative *Ministère de l'Économie et de l'Innovation (MEI)*

Anne-Marie Lan Phan, Head, Intellectual Property Management and technology Transfer (IPMTT) *Canadian Space Agency*

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

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

Louis-Philippe Lemaire, Account Manager *Créaform Ingénierie*

Dominique Leroy, Sector Officer Aerospace and Defence, Strategy and Innovation Policy *Innovation, Science and Economic Development Canada (ISED)*

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

Paul Mercier, Vice President Engineering and Technology - *L3Harris Technologies*

Mouhab Meshreki, Director General (Acting), Aerospace Research Centre *National Research Council Canada (NRC)*

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

David Pollack, Chief of Manufacturing Engineering *Rolls-Royce Canada*

Peter Rosenthal, Industrial Technology Advisor *National Research Council Canada (NRC)*

Philippe Sabat, Industrial Development Advisor, Direction des transports et de la mobilité durable *Ministère de l'Économie et de l'Innovation du Québec (MEI)*

Dominique Sauvé, Director - *SA²GE*

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

// MAIN WORKING GROUP ACHIEVEMENTS

BRINGING TOGETHER THE SECTOR'S CHANGE MAKERS THROUGH THE INTERNATIONAL AEROSPACE INNOVATION FORUM 2020

Building on the success of past years, and in response to the health context related to COVID-19, Aéro Montréal demonstrated its creativity and resilience by reinventing the format of the International Aerospace Innovation Forum. Aéro Montréal held its 7th, 100% virtual and safe edition, from December 14 to 15, 2020 on the theme of "Smart Travelling Rethought." More than 1,000 participants gained insights and knowledge about industry trends from 60 decision-makers and innovation leaders. The program was designed to respond to industry players' most pressing issues and covered topics such as:

- Accelerating the transition to eco-mobility
- Passenger safety and comfort in the era of a global pandemic
- Forecast on air transportation and the evolution of business models
- Unmanned Aerial Vehicles
- Emerging Canadian space technologies in service of the earth

The event gave participants the opportunity to visit more than 85 booths and meet over 250 exhibitors. Some 450 business meetings were held in the presence of 12 prime contractors.

Rated a great success, the event concluded with a strong and unanimous message: The green shift and our race against the clock towards the sectors' decarbonization are upending norms by prompting all players to head in the same direction. Only a systemic approach and increased collaboration among all stakeholders will make it possible to achieve the goal of building a more sustainable industry.



// From left to right: **Denis Giangi**, President of Rolls-Royce Canada and Chair of the Board of Aéro Montréal; **François Legault**, Premier of Québec; **Suzanne M. Benoît**, President of Aéro Montréal; and **Hiroaki Yamamoto**, President and CEO of MHI RJ Aviation, standing in compliance with the social distancing rules imposed by the COVID-19 pandemic



SA²GE – PHASE 3

The SA²GE greener aircraft mobilization project has several phases. These are comprised of collaborative research and development sub-projects aimed at producing innovative and environmentally friendly technologies. Phase 3 brings together four partners: Bell Textron Canada, Bombardier, CMC Electronics and TeraXion. Five other companies are collaborating with these partners. The first year of activity of Phase 3 mobilized 5 research centres, 5 universities and 6 SMEs. Through their collaborative efforts, these companies hope to develop innovative technologies to reduce the aeronautics industry’s environmental footprint.



POUSSÉE PROJECT

- Complete the phase of acoustic and aerodynamic tests on ducted propellers.
- Work on reducing the weight of the systems
- Conduct a life cycle assessment



ÉCONAV-3 PROJECT

- Review the requirements of the noise reduction component (NAFTI)
- Formalize previously implemented FMS functions
- Review activities due to the impacts of the COVID-19 pandemic
- Marinvent Corporation - Conclude the first prototype algorithms for data collection

BOMBARDIER

AILE PROJECT

- Continue developments work on the technological components and on the shared test bench of the integrated system
- Conclude the TRL 4 maturity level review
- Evaluate the energy and environmental performance of the technology developed at the aircraft level

TeraXion

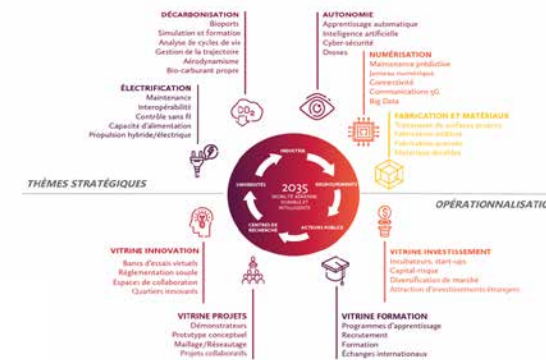
AÉROP HI-FI PROJECT

- Complete the manufacturing of qualification prototypes
- Conduct environmental testing
- Improve the design of photonic modules
- Continue the design of laser and silicon chips
- Continue efforts to reduce weight and energy consumption

POWERING THE QUÉBEC AEROSPACE INNOVATION ZONE PROJECT

Aéro Montréal supported the establishment of a Québec Aerospace Innovation Zone by responding to the Québec government’s invitation to Québec stakeholders (industry, universities and research centres) to work together to develop a proposal that would foster innovation, investment (local and foreign), open collaboration, growth and commercialization, as well as sustainable development. By focusing on sustainable innovation and capitalizing on the cluster’s three existing hubs, Pôle St-Laurent, Pôle Longueuil and Pôle Mirabel, Aéro Montréal submitted a project in November 2020 to the Ministry of Economy and Innovation. Work will continue in 2021 to develop infrastructures, create new multi-sectoral partnerships, and pursue collaboration that will advance Québec’s social, environmental and industrial interests.

Vision 2035 : Mobilité aérienne durable et intelligente



COLLABORATING ACROSS BORDERS: DIMLA, A JOINT PROJECT BETWEEN AÉRO MONTRÉAL AND HAMBURG AVIATION



The joint project between Aéro Montréal and the Hamburg Aviation cluster, which aims to measure and enhance SMEs’ level of digital maturity and internationalization, achieved a major milestone in 2020. Based on work conducted by Québec and German researchers, the international team developed an evaluation grid and key performance indicators that will be integrated into a formal audit. This will generate a roadmap that companies can follow to help them achieve a higher level of digital maturity. This will optimize their productivity and competitiveness, paving the way for greater business opportunities, both locally and internationally. The audit will be tested throughout the first quarter of 2021 and will be integrated into the tools made available to Aéro Montréal members to support their growth and business development.

// MAIN PROJECTS FOR 2021

In 2021, the working group will leverage the important work already begun in 2020. Special attention will be paid to the deployment of the Québec Aerospace Innovation Zone. The working group will also seek to accelerate the democratization of innovation and to include the contributions of our SMEs in the strategic shift that our industry must, and is, willing to make. Environmental and industrial sustainability will continue to play a major role in the way we develop our innovation strategy and support our competitiveness.



The COVID-19 pandemic has weakened the ability of companies to retain their workforce by drastically reducing activity in the sector. During this critical period for the industry, the Human Resources Working Group redoubled its efforts to preserve talent, promote training and maintain the sector's appeal to the next generation.

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 in order to ensure succession and company competitiveness
- Bring together the various industry partner organizations in order to respond in a concerted manner to growing labour needs



"Prior to this pandemic, the aerospace industry was facing a labour shortage and our working group was working to raise awareness of the sector and attract talent. The health crisis has brought its share of challenges, but it also presents opportunities for us to emerge even stronger. We are confident about the future. Now, more than ever, our working group needs to continue to encourage school perseverance in order to prepare the next generation of aerospace professionals. Despite ups and downs, the aerospace industry is resilient and we must continue to identify opportunities for growth by building on expanding sectors and transforming ourselves. Aerospace has a bright future with exceptional talent."

Kevin P. Smith, President of the Working Group
Vice President, Human Resources, Global Operations
Pratt & Whitney

WORKING GROUP MEMBERS 2020



Arianne Blanchette, Vice President, Human Resources - *Groupe DCM*

Gérald Cadet, Director, Bicentennial Planning *McGill University*

Julie Cantin, Director, Human Resources *Starlink Aviation*

Isabelle Carle, Director, Human Resources *Sonaca Montréal*

Aude Clotteau, Director ESG+ - ESG+

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

Isabelle De Bellefeuille, Talent Acquisition Lead *L3Harris Technologies*

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

Jocelyn Dujmovic, Director, Human Resources *Hutchinson Aéronautique et Industrie*

Louis-Marie Dussault, Associate Director, Studies *École nationale d'aérotechnique (ÉNA)*

Carole El Ayoubi, Director of Education *Concordia Institute of Aerospace Design and Innovation (CIADI)*

Manon Fafard, Vice President, Human Resources *Bombardier*

Solange Fresneau, Vice President, Corporate Affairs and Administration - *PCM Innovation*

François Garnier, University Professor and Director of AÉROÉTS - *École de technologie supérieure (ÉTS)*

Steve Johnston, Business partner, Human Resources - *Rolls-Royce Canada*

Anne-Renée Meloche, Vice President, Human Resources and Communications *Groupe Meloche*

Ahde Mouafikoune, Lead, Business development and business services - *Polytechnique Montréal*

Geneviève Nantel, Director, Human Resources *STELIA Aerospace*

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

Anne Sophie Parenteau, Human Resources Site Leader - *Bell Textron Canada*

Clothilde Petitjean, Director, Programs *Consortium for Research and Innovation in Aerospace in Quebec (CRIAQ)*

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

Jessica Roy, Director, Human Resources and Communications - *Atlas Aéronautik*

Kevin P. Smith, Vice President, Human Resources, Global Operations - *Pratt & Whitney*

Jean Thibodeau, Director, Human Resources *Airbus Canada*

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 (MEI)*

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

// DEVELOPING SKILLS AND UPDATING RECRUITMENT POLICIES

UNVEILING OF A WHITE PAPER TO PROMOTE EQUITY, DIVERSITY AND INCLUSION IN AEROSPACE IN QUÉBEC

On March 9, 2020, Aéro Montréal unveiled its white paper entitled *Pour des organisations inclusives dans la grappe aérospatiale du Québec: Miser sur des compétences diversifiées et des pratiques équitables (Building Inclusive Organizations in Québec's Aerospace Cluster: Leveraging Diverse Skills and Equitable Practices)* in the presence of Jean Boulet, Minister of Labour, Employment and Social Solidarity and Minister responsible for the Mauricie region. Held as part of International Women's Day, the event brought together 38 people and resulted from the Human Resources Working Group's efforts to promote the advancement of diversified skills and fair practices within organizations in the sector. In providing this white paper, the working group fulfilled two objectives: to equip Québec entrepreneurs for the integration of international labour within their companies; and to facilitate the implementation within companies of mechanisms to ensure the retention of immigrant talent.



// **Steeve Lavoie**, President, Bell Textron Canada; **Denis Giangi**, President, Rolls-Royce Canada and Chair of the Board, Aéro Montréal; **Suzanne Benoît**, President, Aéro Montréal; **Jean Boulet**, Minister of Labour, Employment and Social Solidarity and Minister responsible for the Mauricie region; **Isabelle Bemeur**, Director, Direction régionale de Services Québec de l'Île-de-Montréal; and **Kevin P. Smith**, Vice President, Human Resources, Global Operations Pratt & Whitney.

A SECTION DEDICATED TO 4.0 SKILLS DEVELOPMENT ON THE AEROPORTAL

The 4.0 skills development sub-committee in 2020 produced a detailed inventory of training programs, centres of expertise and laboratories, subsidized programs, and useful resources available in Québec. A new section was created on the Aeroportal to make the best use of this inventory.



// PROVIDING TOOLS TO PREPARE FOR THE FUTURE

COMPLETION AND UNVEILING OF A STUDY ON THE PERCEPTION OF THE NEXT GENERATION OF AEROSPACE PROFESSIONALS IN QUÉBEC

To avoid a labour shortage situation within the industry, the Human Resources Working Group mandated the firm Léger to survey the perceptions of tomorrow's young workers and to recommend how to maintain the next generation's interest in the sector. The results of

this study were unveiled on October 9, 2020 in the presence of Mr. Jean Boulet, Minister of Labour, Employment and Social Solidarity and Minister responsible for the Mauricie region.

Mrs. Maria Della Posta, President of Pratt & Whitney Canada, also attended this virtual meeting organized by Aéro Montréal and shared her inspiring career journey. A panel composed of specialists in aerospace workforce challenges, young ambassadors from the Regroupement Relève d'Aéro Montréal (RRAM), and representatives of academic institutions discussed how the crisis has affected the perceptions of the next generation of aerospace workers.

VITRINES 2020 VIRTUAL EVENT
DECEMBER 16, 2020

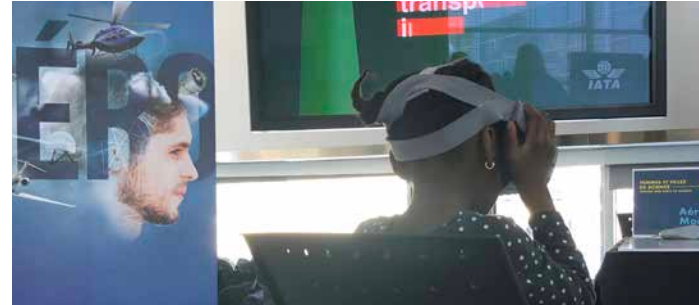
The Human Resources Working Group hosted a 4th edition of its Vitrites event, held virtually during International Aerospace Week. Created to showcase the many career, employment, internship and training opportunities currently available in Québec's aerospace sector, it was attended by more than 1,100 people.



// From left to right – **Béatrice Perier-Agostini**, Director, Human Resources Working Group, Aéro Montréal; **Kevin P. Smith**, Vice President Human Resources, Global Operations, Pratt & Whitney; **Pascal Desilets**, Director, École nationale d'aérotechnique (ÉNA); **Charlotte Laramée**, Director Growth, Aéro Montréal; **Guillaume Bégin**, Advisor, Industrial Development, Direction des transports et de la mobilité durable, ministère de l'Économie et de l'Innovation (MEI)

ACTIVE YEAR FOR THE REGROUPEMENT RELÈVE D'AÉRO MONTRÉAL (RRAM)

In 2020, its third year of existence, the RRAM organized and participated in 10 major activities. They included the Women and Girls in Science event organized by the Montréal Science Centre and a meeting about young people's perceptions of aerospace in times of a pandemic organized by Aéro Montréal. Throughout the year, 20 RRAM ambassadors took part in meetings of the working group, offering its members the opportunity to learn more about the aspirations of the next generation.



// Aerospace career discovery workshop organized by RRAM at the Montréal Science Centre



// Members of the RRAM and Aéro Montréal team learn about Nexus during a private tour of Bell Textron Canada facilities

"Aeronautics is a field of passion. The RRAM has highlighted little-known aspects of this sector through roundtable discussions or by engaging students through a case study. Engineering, marketing, operations, MRO: the opportunities are endless. Entering this field today means taking part in the recovery and aircraft of the future."

Julien Dorion
RRAM Ambassador and MRO Engineer
Pratt & Whitney Canada

// ORGANIZING PROGRAMS AND INITIATIVES TO MAINTAIN THE ATTRACTIVENESS OF THE SECTOR



INITIATIVE	Passion from Within and Passion for Flight
CATEGORY	Mobilization of current and future workforce
OBJECTIVE	In-person and virtual activities to help youths learn about airplanes and aerospace in a playful and creative format
PARTNERS	Government of Québec (MEI), Conseil Emploi Métropole (CEM), Arconic Foundation, Cosmodôme, school boards, educational institutions

Results 2020

- 25 elementary school classes in Québec participated in the virtual program. Program activities were integrated into some 20 day camps and events organized by the Cosmodôme, reaching more than 1,000 young people. A video was produced by the Cosmodôme and was broadcast during the virtual Vitrites 2020 event. The video is accessible to the general public on the Aeroportal's YouTube page



INITIATIVE	AeroPortal
CATEGORY	Mobilization of current and future workforce
YEAR OF CREATION	2014
OBJECTIVE	To showcase careers and occupations in the aerospace industry, and to centralize sector information and job postings to make them accessible to the general public and to professionals seeking employment
PARTNERS	Government of Québec (MAMH and Services Québec), Montréal Metropolitan Community (MMC), Comité sectoriel de main-d'oeuvre en aérospatiale (CAMAQ)
NUMBER OF PARTICIPANTS	Nearly 20,000 subscribers on Facebook, more than 3,000 subscribers on LinkedIn, and more than 2,000 candidates in the portal's database



IMAGE, INFLUENCE
AND MARKETING
PILLAR



Shaken by an unprecedented crisis, the Québec aerospace industry had to show resilience throughout 2020.

Made up of communications professionals from the aerospace industry, the Image, Influence and Marketing Committee deployed numerous tools to continuously draw an up-to-date portrait of the situation being experienced by the industry, inform members about government measures, and compile available crisis assistance programs. The committee pulled on the various working groups to reflect the challenges and needs of the industry in representations made to governments. With the recovery in mind, it also sought to emphasize the attractiveness of the sector.

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 Aéro Montréal's Board of Directors or Secretariat, develop major communication projects that meet the needs of the industry and are adapted to the economic recovery
- Promote Québec's aerospace sector to cluster members and the public, locally, nationally and internationally
- Support Aéro Montréal's various working groups in carrying out their mandates
- Highlight the services available to current and potential members of Aéro Montréal with a view to attracting, satisfying and retaining members



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

"The pandemic allowed members of the Image, Influence and Marketing Committee to discuss the major challenges facing the industry, the practices being applied in our communities, and the priorities to be addressed to emerge from this situation stronger as a group. With all the challenges confronted over the past year, our discussions on a green recovery and innovation were inspiring and provided a promising outlook for the future of Canada's aerospace industry."

COMMITTEE MEMBERS 2020

Patricia Bergeron, Manager, Communications
Bell Textron Canada

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

Marlène Daugarou, Marketing and Corporate
Communications Supervisor
AV&R

Josée Gaulin, Manager, Communications
& Marketing
L3Harris Technologies

Julian Lucchesi, Strategic Partnerships Manager
Centech

Mark Masluch, Director, Communications
& Public Affairs - *Bombardier*

Nadine Mercure, Consultant, Communication,
Marketing and Digital

Martin Perron, President - *Bloom*

Catherine Thibault, President of the Image,
Influence and Marketing Committee, Director,
Public Affairs and Global Communications
CAE

// AÉRO MONTRÉAL COMMUNICATIONS IN 2020

13 press releases

55 media interviews

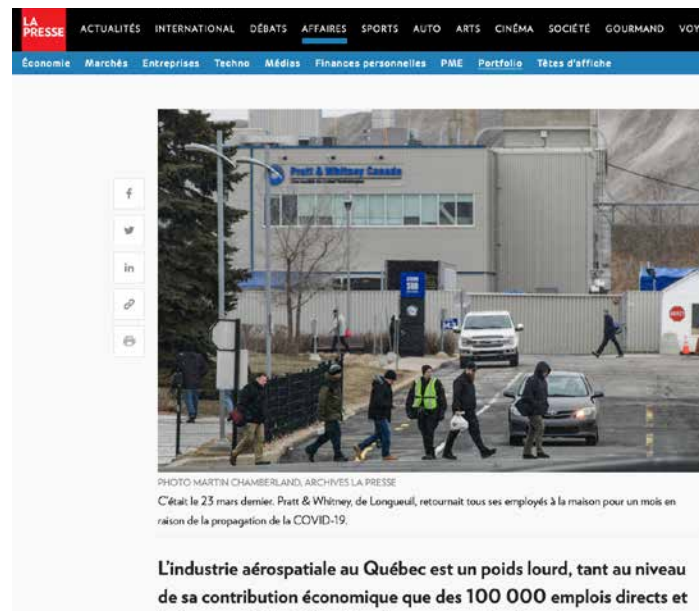
141 articles in the media that included a reference to Aéro Montréal

Three special sections in the media (aerospace portfolio in La Presse+ in February, October and December)

3,903 Twitter subscribers, a 10% increase over 2019

17,870 subscribers on LinkedIn, a 25% increase over 2019

18,458 subscribers on Facebook



// SUPPORTING MEMBERS DURING A CRISIS

CREATING TOOLS ADAPTED TO THE NEEDS OF THE INDUSTRY

The Image, Influence and Marketing Committee mobilized as early as March to create a unique hub that centralized all resources available to members during the COVID-19 pandemic. This tool provided a daily monitoring of the financial assistance available to members as well as the government measures in place. In the period of renewed activity, the hub was also a tool for promoting a series of seven webinars and personalized support put in place by Aéro Montréal to assist SMEs. Finally, it offered members guides created to ensure a safe return in the manufacturing sector.

More than 112 email blasts and 20 newsletters were sent to provide the latest news and virtual events.

Updated visuals and email tools were also introduced as part of these communication efforts.

// REPRESENTING THE NEEDS OF THE SECTOR

INITIATING EXCHANGES WITH GOVERNMENTS

The Image, Influence and Marketing Committee skillfully represented the industry's challenges to representatives of various levels of government and public institutions. More than 13 meetings were held and 10 official letters sent. This work raised government stakeholder awareness of the aerospace industry's challenges and needs.



PROMOTING MARKET DIVERSIFICATION THROUGH THE SYMPOSIUM ON THE CANADIAN DEFENCE AND SECURITY MARKET

Aéro Montréal, STIQ and Canada Economic Development for Québec Regions jointly organized the 5th edition of the Symposium on the Canadian Defence and Security Market on October 19, 2020. Offered virtually, this event, which brought together more than 300 people, mapped new market realities. It was also an opportunity to promote sector-related tools available to members of Aéro Montréal: the SDQuébec portal and training in defence and security.



ENCOURAGING THE IMPLEMENTATION OF A SECTORAL RECOVERY PLAN: RELAUNCH MTL

As part of the “Relaunch MTL” campaign, Aéro Montréal and the Chamber of Commerce of Metropolitan Montréal held the Strategic Aerospace Forum on Monday, November 2, 2020.

Held virtually, the Forum was attended by more than 500 people. It provided an opportunity to discuss a sector recovery strategy based on a transition to new business models, a low-carbon industry, and the preservation of a highly skilled workforce.



// The Honourable **Mélanie Joly**, Minister of Economic Development and Official Languages, and **Suzanne M. Benoit**, President of Aéro Montréal

// BOOSTING THE INDUSTRY'S IMAGE

The Committee created a digital campaign with the hashtag #ÀVotreService (At Your Service) to explain to the public how Québec's aerospace sector benefits citizens. The main goal was to highlight the essential nature of the industry, both in times of crisis and in everyday life.

Designating September as aerospace month, Aéro Montréal published brief and targeted articles on LinkedIn, Twitter and Instagram on the indispensable role played by aerospace industry products.



THE #ÀVOTRESERVICE IN NUMBERS

9 publications

349 reactions

77 shares

72 198 hits

// MONITORING THE ATTRACTIVENESS OF THE SECTOR

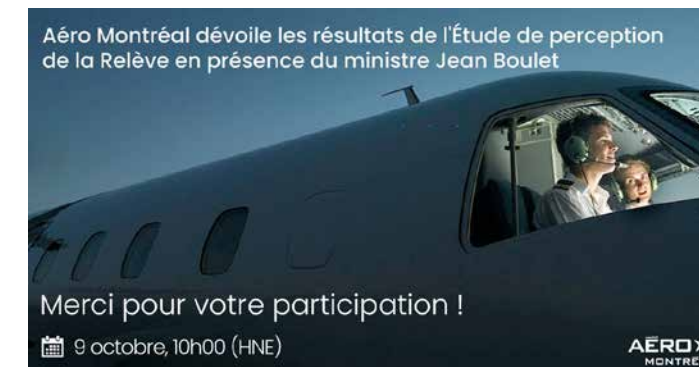
EDUCATION ABOUT EQUITY, DIVERSITY AND INCLUSION

The Image, Influence and Marketing Committee helped to organize the launch of a white paper entitled *Pour des organisations inclusives dans la grappe aérospatiale du Québec : Miser sur des compétences diversifiées et des pratiques équitables*, (*Building Inclusive Organizations in Québec's Aerospace Cluster: Leveraging Diverse Skills and Equitable Practices*) in the presence of Jean Boulet, Minister of Labour, Employment and Social Solidarity and Minister responsible for the Mauricie region.



SHARING NEXT GENERATION PERCEPTIONS ABOUT THE INDUSTRY

In the presence of Jean Boulet, Minister of Labour, Employment and Social Solidarity and Minister responsible for the Mauricie region, the Image, Influence and Marketing Committee team contributed to the unveiling of the results of the *Étude de perception de la relève face à l'industrie aérospatiale* (*Study on the Perception of the next generation with regard to the aerospace industry*). During the virtual meeting, Maria Della Posta, President of Pratt & Whitney Canada, shared her inspiring career journey with the next generation. This testimonial was followed by an open discussion on the impact of the crisis on the perceptions of young people, moderated by a panel of experts on labour challenges. More than 180 people attended this ground-breaking event.



WEBINARS SERIES IN COLLABORATION WITH AVIATION WEEK

The Aéro Montréal team offered an exclusive series of three webinars in collaboration with Aviation Week, a world-renowned aerospace industry magazine, to support cluster members, equip them and help them through the crisis confronting the aerospace industry. The themes of the webinars were very successful:

- 1 - COVID-19 and the Aerospace Supply Chain (250 participants)
- 2 - Can government make aviation sustainable? (205 participants)
- 3 - Intelligent Procurement: Leveraging commercial velocity for Defence (109 participants)

By featuring several international experts, this series of webinars provided an opportunity to take stock of the industry's situation at a key moment in the crisis. They also provided a vision of the future to aerospace cluster members.



// MAIN PROJECTS IN 2021

In 2021, the Image, Influence and Marketing Committee will work to strengthen a sense of belonging to the sector among the public and decision-makers by deploying a targeted communication strategy. Through concerted government relations, it will continue to represent the industry's interests and advance measures proposed by the Alliance for the Aerospace Recovery. It will also focus on implementing mechanisms to promote the sector and attract and retain industry talent. Encouraging actions designed to propel this sector towards a greener future will also be emphasized.

Finally, supporting Aéro Montréal's various working groups in the deployment of their projects and in the organization of events will be key committee priorities.

// BOARD OF DIRECTORS

During the three-year strategic planning process, it was noted that the best performing clusters are those that are opening up to other sectors. In 2020, this approach was adopted with the addition of three new partner members from related sectors to the Board of Directors: Aéroports de Montréal (air transport component); CENTECH (start-up component); and the Fonds de Solidarité FTQ (financing component). The Board also welcomed MHI RJ Aviation to the ranks of our OEMs.



// GOVERNANCE COMMITTEE

The Governance, Ethics and Risk Management Committee was chaired until the third quarter of 2020 by Claude Baril, then President of Stelia, North America. Michel Grenier, Vice President and General Manager, Thales Canada, Avionics, succeeded him. During the year, the committee developed a *Risk Management Policy* (continuously updated dashboard), a *Policy for the Management and Use of Computer Resources*, as well as a *Deconfinement Plan for Aéro Montréal employees* to ensure a safe return to the office in the context of the global pandemic. Each year, the Committee also conducts an evaluation of the Board in order to improve the structure of the meetings and better respond to the expectations of the directors.

// FINANCE AND AUDIT COMMITTEE

The Finance and Audit Committee, chaired by Jean Blondin, President of Abipa Canada, prepared the budgets and performed its internal audit and monitoring of the organization's finances. The committee closely tracked the impact of COVID-19 on Aéro Montréal's operations and took necessary steps to enable operations to continue. The Committee also looked into updating internal controls to better reflect current practices.

// HUMAN RESOURCES COMMITTEE

The Human Resources Committee met twice in 2020 to discuss strategic human resources management matters such as pandemic health and teleworking practices, employee salary adjustments and succession planning. An in-person return to work plan was developed according to CNESST standards to ensure a safe and functional work environment but could not be deployed due to continued confinement requirements.

// ANNUAL GENERAL MEETING 2020

The Annual General Meeting, held for the first time in a 100% virtual format, was chaired by Denis Giangi, Aéro Montréal's Board Chair and President of Rolls-Royce Canada. It was attended by nearly 100 people. The members endorsed all of the decisions made by the Board of Directors and the 2019 Activity Report was distributed on the theme of sustainable mobility. The financial statements as at December 31, 2019, prepared by management in accordance with Canadian accounting standards for not-for-profit organizations, were audited without reservation by the firm Deloitte and adopted at the meeting.



// IMPLEMENTATION OF THE QUÉBEC AEROSPACE STRATEGY

In May 2020, Pierre Fitzgibbon, Québec's Minister of Economy and Innovation, announced the updating of the Québec Aerospace Strategy 2016-2026. This strategy is the result of a major mobilization of industry players, whose findings, ideas and aspirations led to the development of several dozen concrete measures to meet current challenges and achieve the government's objectives. Thanks to this collective effort, the strategy reflects the needs of stakeholders who are propelling Québec's aerospace sector forward and spreading Québec expertise and know-how around the world.

In August, Aéro Montréal submitted a brief containing recommendations from members of the aerospace cluster aimed at supporting the industry's recovery while ensuring that a long-term strategic vision is maintained. The implementation of these recommendations will enable the Québec aerospace sector to maintain its position as a world leader.

// WORKING GROUP DAY 2020

Aéro Montréal held the 2nd edition of Working Group Day on February 17, 2020, at the Maison des régions de Montréal. More than 80 members and active partners of the cluster's working groups were present. This new edition provided an opportunity to present the year's results and discuss the transformation that the industry will have to make to meet environmental challenges. It also explored common actions needed to overcome these challenges and achieve the goal of becoming the most innovative cluster in the world. Aéro Montréal would like to thank everyone involved in its projects and committees for their participation and contributions.



// ALLIANCE FOR THE AEROSPACE RECOVERY

During the year, our sector's leaders mobilized in an unprecedented way to set up the **Alliance for the Aerospace Recovery (AAR)**, a strategic committee under the direction of Aéro Montréal's Board of Directors. Its goal is to develop a concrete action plan that could be rapidly implemented and adapted to the needs of Québec's aerospace industry. The Alliance features four working groups: **Financing and Consolidation; Markets and Defence; Innovation and Environment; and Representation**. The more than 60 people involved in the Alliance, divided into four task forces, developed tangible measures to meet the sector's needs, boost the economy, and create value for all Quebecers and Canadians. These recommendations were also informed by Aéro Montréal's working groups and strategic committees and by feedback received during the outreach program to companies in the aerospace cluster (direct consultation with more than 150 SMEs and large companies). The measures, which were presented to the Government of Québec and Canada, are as follows:

- Launch of a national Québec/Canada Eco-Mobility project
- Increase competitiveness through advanced manufacturing (automation, 4.0, etc.)
- Creation of an expert office in aerospace innovation
- Support for company cash flow
- Establishment of a hybrid growth and development fund dedicated to the aerospace sector
- Facilitation for obtaining export permits
- Increase Québec companies' share of Canadian defence contracts
- Supply chain optimization and relocation



// AÉRO MONTRÉAL TESTIMONY TO THE HOUSE OF COMMONS STANDING COMMITTEE ON FINANCE

On December 7, 2020, Aéro Montréal President Suzanne Benoît proudly represented the Québec aerospace industry before the House of Commons Standing Committee on Finance as part of the pre-budget consultations for Budget 2021. In her presentation, she stressed the critical and strategic importance of the aerospace sector to Canada's economy and reiterated the need for the government to put in place a dedicated strategy for the sector on a national scale and to act quickly since every day counts to revitalize the industry.

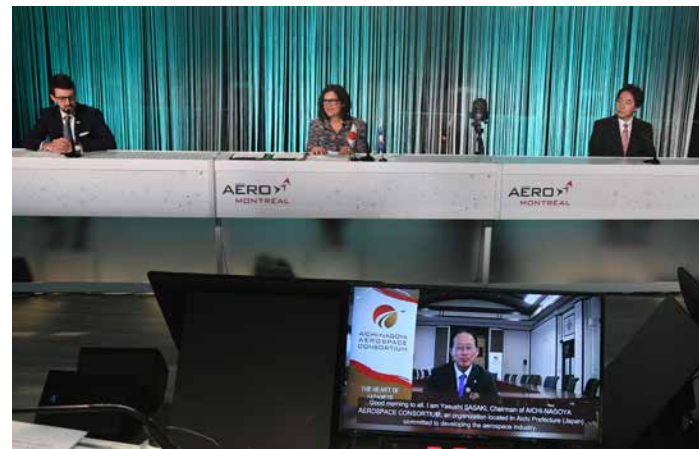


“By contributing to the aerospace industry’s development efforts and positioning itself as a strategic partner, the Canadian government is creating value and boosting our economy. It is supporting an industry that is enabling our country to continue to stand out and expand around the world.”

Suzanne M. Benoît,
President
Aéro Montréal

// HONOURING JAPAN

Aéro Montréal honoured Japan for its interest, involvement and investment in Québec’s economy during the 2020 edition of the International Aerospace Innovation Forum, held December 14 to 15 as part of International Aerospace Week - Montréal. A strategic partnership was signed on December 15 between Aéro Montréal and Japan’s largest aerospace cluster, AICHI-NAGOYA AEROSPACE CONSORTIUM, reinforcing the already strong and deep relationship between Québec and Japan. The agreement was signed by Yasushi Sasaki, Chair of the Board of AICHI-NAGOYA AEROSPACE CONSORTIUM, accompanied by David Brulotte, Québec’s Delegate General in Tokyo, as well as Osamu Izawa, Consul General of Japan in Montréal.



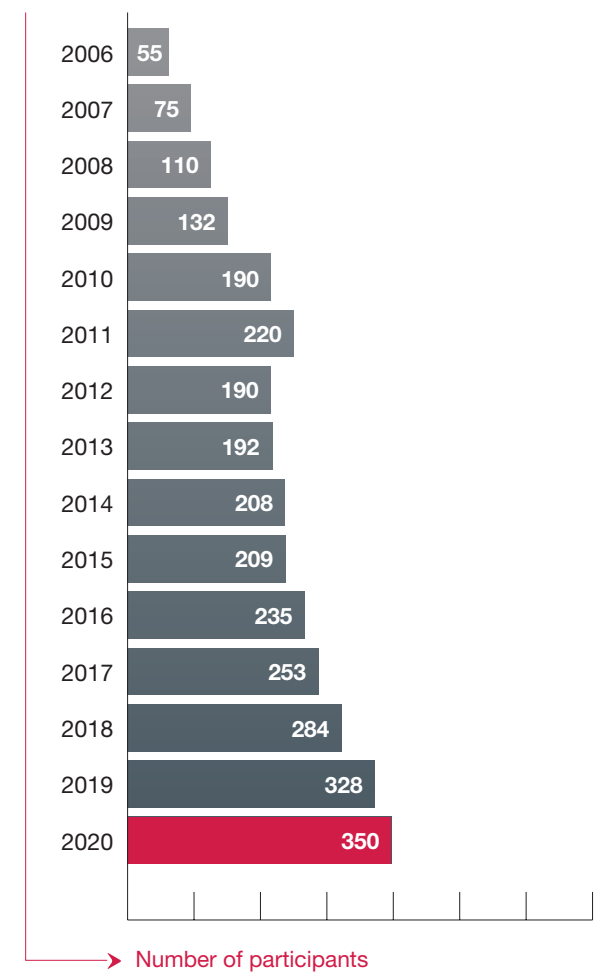
// From left to right: David Brulotte, Québec’s Delegate General in Tokyo, Suzanne M. Benoît, President of Aéro Montréal, Osamu Izawa, Consul General of Japan in Montréal, Yasushi Sasaki, Chair of the Board of AICHI-NAGOYA AEROSPACE CONSORTIUM

// MOBILIZATION & 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.

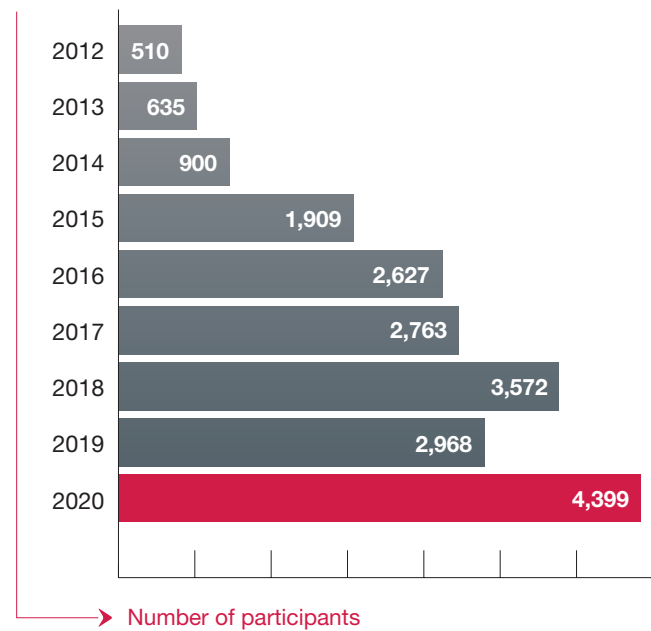
The following tables provide a glimpse of the energy they devote to Aéro Montréal and the growth of our industry.

// INDUSTRY MOBILIZATION

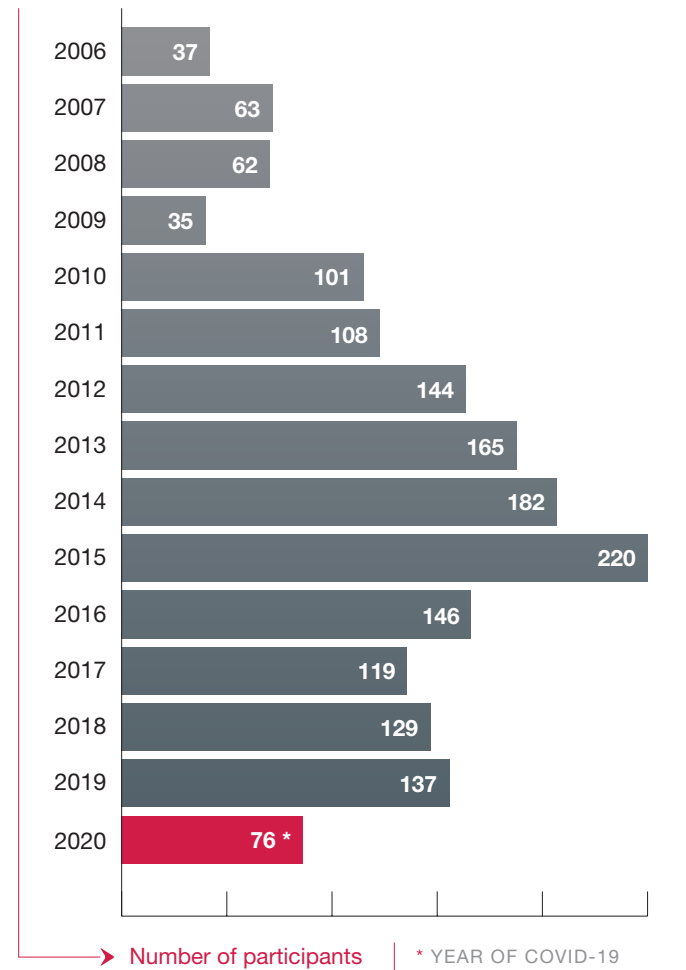


// PARTICIPATION IN SME EVENTS

In 2020, nearly 4,400 people participated in our SME events, a nine-fold increase over 2012. Note that the International Aerospace Week - Montréal 2020 events, consisting of the International Aerospace Innovation Forum, the MRO and Defence & Security Day, and Vitaines 2020 attracted a record number of participants, not to mention the numerous webinars organized to help our aerospace companies emerge from the pandemic crisis.



// ATTENDANCE AT THE ANNUAL GENERAL MEETING OF MEMBERS



// PROJECTS GENERATED BY THE MACH INITIATIVE

964 IMPROVEMENT PROJECTS COMPLETED OR UNDERWAY TO DATE:

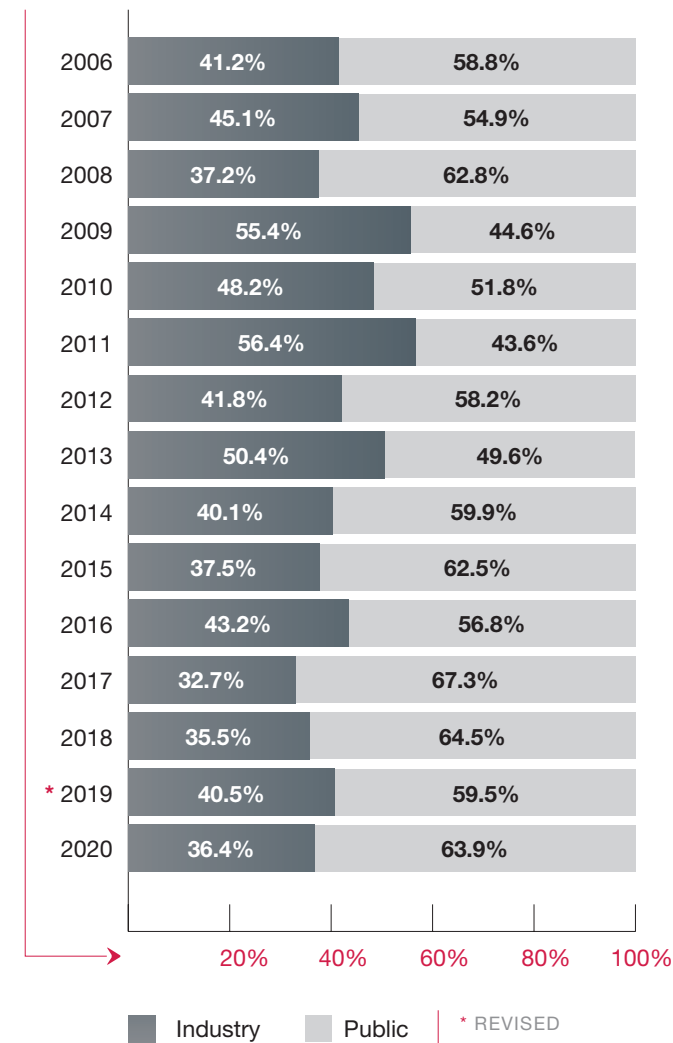
255 projects carried out internally with or without the support of a sponsor

371 projects requiring special expertise

338 skills development projects

DISTRIBUTION OF TOTAL CONTRIBUTIONS FROM THE PUBLIC SECTOR AND INDUSTRY (2006-2020)

In 2020, the weight of the private sector relative to the total contributions of the entire cluster reached 36.4%. Note that in 2019, we changed the methodology by adding to the industry contributions the estimated amount of in-kind contributions made by our companies in all our initiatives.

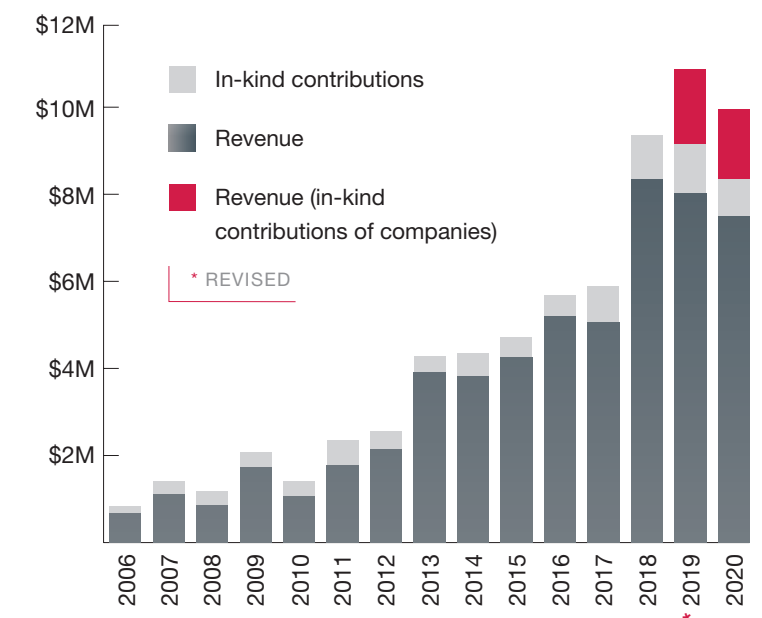


DISTRIBUTION OF THE CONTRIBUTIONS FROM THE PUBLIC SECTOR AND INDUSTRY IN 2020

CONTRIBUTION FROM THE PUBLIC SECTOR IN CASH	\$6,145,240	61.6%
CONTRIBUTION FROM THE PUBLIC SECTOR IN KIND	\$202,780	2.0%
CONTRIBUTION FROM INDUSTRY IN CASH	\$2,979,719	29.9%
CONTRIBUTION FROM INDUSTRY IN KIND	\$646,840	6.5%
TOTAL	\$9,974,578	100.0%

EVOLUTION OF TOTAL CONTRIBUTIONS (2006-2020)

By combining revenue and in-kind contributions, total support to the cluster declined by 8.6% in 2020 to \$9.97 million due to the decline in some activity caused by the pandemic. Contributions in 2020 were 12 times more than in 2006. In 2019 and 2020, we modified the methodology by adding the in-kind contributions of companies within our Initiatives to the calculation of total contributions. Total revenue reached \$9.13 million in 2020 while in-kind contributions amount to \$849,000.



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	32	25	\$400	\$80,800	\$103,200
Special meetings - Impact of COVID-19	3	2.5	15	13	\$400	\$14,000	\$15,600
Executive Committee	8	6.0	5	5	\$400	\$12,600	\$12,600
Finance and Audit Committee	6	9.0	5	5	\$400	\$18,200	\$18,200
Governance, Ethics and Risk Management Committee	4	4.5	5	5	\$400	\$8,400	\$8,400
Joint Governance and Finance & Audit Committee	1	1.0	6	6	\$400	\$2,400	\$2,400
Human Resources Committee	2	1.5	5	5	\$400	\$2,800	\$2,800
Annual General Meeting (AGM)	1	2.0	76	61	\$200	\$24,400	\$30,400
Working Groups Day	1	4.0	65	45	\$200	\$36,000	\$52,000

COMMITTEES

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)
Innovation Monitoring and Strategy Working Group	4	8.0	22	12	\$200	\$18,500	\$35,500
Aerospace Innovation Forum Pilot Committee	4	4.0	7	5	\$200	\$3,800	\$5,200
Aviation Week Webinars Pilot Committee	2	2.0	4	4	\$200	\$1,600	\$1,600
Aerospace Innovation Zone of Québec (ZIAQ) Pilot Committee	7	7.0	16	7	\$200	\$9,400	\$22,000
<i>a) Research Centres and Universities Committee (ZIAQ)</i>	4	4.0	8	0	\$200	- \$	\$6,000
<i>b) Development Agencies Committee (ZIAQ)</i>	5	5.0	6	0	\$200	- \$	\$5,600
<i>c) Industry Committee (ZIAQ)</i>	3	3.0	4	4	\$200	\$2,600	\$2,600
Defence and Security Working Group	4	9.0	29	20	\$200	\$34,800	\$51,400
Student Committee - Intelligent Algorithm Development	2	320.0	5	0	\$20	- \$	\$28,000

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)
Partnership & Growth Working Group	4	8.5	8	8	\$200	\$13,900	\$13,900
Industrialization of innovation Community of Interest ¹	1	1.5	5	4	\$200	\$1,200	\$1,500
Surface Treatment & REACH Community of Interest ²	1	1.5	10	10	\$200	\$3,000	\$3,000
Alliance for the Aerospace Recovery Committee (AAR)	6	8.5	15	11	\$400	\$38,600	\$51,200
a) Finance & Consolidation Task Force (AAR)	3	4.5	10	9	\$200	\$7,800	\$8,700
b) Markets & Defence Task Force (AAR)	1	1.5	15	15	- \$	\$4,500	\$4,500
c) Innovation & Environment Task Force (AAR)	2	3.0	11	11	- \$	\$6,600	\$6,600
Validation and Strategic Committee Accelerator 360°	1	1.5	8	5	\$200	\$1,500	\$2,400
Space Committee	1	2.0	14	10	\$200	\$4,000	\$5,600
Gilles-Demers Jury	2	3.0	10	6	\$200	\$3,600	\$6,000
MRO Working Group	5	9.5	15	13	\$200	\$26,100	\$30,800
Workforce Working Group	1	1.5	6	5	\$200	\$1,500	\$1,800
Competitiveness Working Group	1	1.0	6	6	\$200	\$1,200	\$1,200
Regulations Working Group	1	1.0	7	6	\$200	\$1,200	\$1,400
RPAS Working Group	4	8.5	20	13	\$200	\$22,100	\$33,500
RPAS and Defence Working Group	2	3.0	9	6	\$200	\$3,600	\$5,400

¹ This Community is now the SME and Innovation Committee which has been transferred to the Innovation Monitoring and Strategies Working Group ² During the year, this Community was transferred to the Green and Intelligent Supply Chain Working Group

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)
Green and Intelligent Supply Chain Working Group	4	8.5	6	6	\$200	\$10,000	\$10,000
Surface Treatment & REACH Community of Interest	2	4.0	10	8	\$200	\$6,400	\$8,000
MACH FAB 4.0 Pilot Committee	2	6.0	10	7	\$200	\$8,400	\$12,000
Large Manufacturers Vision	1	2.0	3	3	\$200	\$1,200	\$1,200
MACH Initiative – In-kind engagement of active sponsors*	5	255.0	5	5	\$125	\$180,000	\$180,000
Human Resources Working Group (HR)	4	9	19	10	\$200	\$17,300	\$33,400
Joint HR & Image, Influence and Marketing Working Group	1	2.0	8	3	\$200	\$1,200	\$3,200
Interns Committee	4	3.5	6	3	\$200	\$1,800	\$4,300
Skills 4.0 Committee	4	4.0	4	2	\$200	\$1,600	\$2,800
Passion from Within and Passion for Flight Pilot Committee	1	1.0	5	2	\$200	\$400	\$1,000
Heritage Committee	2	1.0	4	3	\$200	\$900	\$1,200
Image, Influence and Marketing Committee (IIM)	3	5.25	6	6	\$200	\$5,650	\$5,650
Regroupement Relève Aéro Montréal (RRAM) Committee	10	15.0	16	3	\$20	\$930	\$4,890
RRAM Working Group	9	9.0	5	2	\$20	\$360	\$980
TOTAL		786				\$646,840	\$849,620

* 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



Suzanne M. Benoît*
PRESIDENT



Mélanie Lussier*
VICE PRESIDENT,
OPERATIONS



Marie-Josée Kasparian*
DIRECTOR, STRATEGY
AND CORPORATE AFFAIRS



Kaven Delarosbil*
DIRECTOR, COMMUNICATIONS

// Responsible for the Image,
Influence and Marketing Pillar



Pierrette Daigle*
EXECUTIVE ASSISTANT

The Aéro Montréal team underwent several changes in 2020. At the beginning of the year, it moved to new premises – from the 8th to the 3rd floor of the World Trade Centre. Taking advantage of this opportunity to optimize its internal operating process, the team efficiently and effectively implemented a safe teleworking policy at the onset of the COVID-19 pandemic. In 2020, the entire team excelled through its unwavering commitment and unprecedented support for the interests of cluster members.



Martin-Charles Boucher
PROJECT MANAGER, GREEN
AND INTELLIGENT SUPPLY CHAIN

// Green and Intelligent Supply Chain
Working Group
// MACH FAB 4.0 Initiative



Pauline Breyton
PROJECT MANAGER,
STARTAÉRO 360° AND SDQUÉBEC



Sharon Core
PROJECT MANAGER,
EVENTS AND SPECIAL PROJECTS



Daniel Guedj
PROJECT MANAGER,
MARKETING, COMMUNICATION,
WEB AND SOCIAL MEDIA



Léa Guicheteau
PROJECT MANAGER,
COMMUNICATIONS
AND MEDIA RELATIONS

// Image, Influence and Marketing Committee



Charbel Khoury
DIRECTOR, PROJECT MANAGEMENT
OFFICE (PMO)



Charlotte Laramée
DIRECTOR, GROWTH

// Responsible for the Growth Pillar and Partnership
& Growth, MRO and RPAS Working Groups
// Alliance for the Aerospace Recovery Committee
// Accelerator 360° Initiative



Sylvain Lefrançois
DIRECTOR, DEFENCE AND SECURITY

// Defence & Security Working Group



Chloé Moffatt
TECHNICIAN, ADMINISTRATION,
EVENTS AND MEMBERSHIP SERVICES

// RPAS Working Group



Jarrod Morley
DIRECTOR, INNOVATION, COMPETITIVENESS
& PRODUCTIVITY

// Responsible for the Innovation, Competitiveness
& Productivity Pillar and the Innovation Monitoring
and Strategy Working Group



Béatrice Perier-Agostini
DIRECTOR, NEXT GENERATION
& WORKFORCE

// Responsible for the Workforce Pillar
and the Human Resources Working Group



Anouk Warwrzyniak
PROJECT MANAGER, GROWTH

// Partnership & Growth, MRO
and Space Working Groups
// Accelerator 360° Initiative

* MEMBERS OF THE DIRECTOR COMMITTEE

INFORMATION AS OF DECEMBER 31, 2020

DATE	EVENT
FEBRUARY	
4-6	StartAero 360° - Advanced Transportation Manufacturing Summit (Toronto)*
7	Accelerator 360° - Breakfast - Branding
9	Women and Girls in Science 2020 – participation of the RRAM *
10	Accelerator 360° - Training in partnership culture
14	StartAero 360° - Back to School Activity - General Meeting
16	ENA Open House and RRAM Discovery Workshop*
17	Working Group Day (2 nd edition)
21	SA2GE - Training Fight against climate change - What solutions for the aviation industry?*
27	Visit of Bell and Presentation of the NEXUS (RRAM)
MARCH	
2-3	GIFAS Mission to Canada*
5-6	Cosmodome Day Camp: RRAM Discovery Workshop*
5	International Women's Day - RRAM visit to MDA with meeting of women leaders
9	Launch of the White Paper on Ethics, Diversity and Inclusion (EDI) and Press Conference with Minister Boulet
10	RRAM - Roundtable with Major General Dany Fortin, Canadian Armed Forces
11	Accelerator 360° - Finance training
16	StartAero 360° - Trends and Opportunities
25-26	StartAero 360° - World Summit AI America
30	Webinar: Navigating through the help available to support your business

* EVENTS ORGANIZED BY OUR INDUSTRY PARTNERS

DATE	EVENT
APRIL	
3	Accelerator 360° - Introduction to the defence market
3	Webinar: Business Challenges and Legal Obligations in times of pandemic
15	Webinar: Communication in times of crisis: Tools and Recommendations
21	Webinar: Cybersecurity and Telework for Aerospace Companies
22	StartAero 360° - Caring Conversation "Towards a Resilient Business Model"
24	Webinar: Business Challenges and Legal Obligations in times of pandemic
30	Webinar: How do you plan for business recovery? Discussion with Minister Jean Boulet
MAY	
7	StartAero 360° - Trends and Opportunities - United States
21	StartAero 360° - Trends and Opportunities - Canada
21	Accelerator 360° - Meeting Consolidation & Strategic Partnerships
25	Aéro Montréal Annual General Meeting
29	Webinar: Roundtable: Strategic Importance of Aerospace in Québec and Canada - with Minister Fitzgibbon
JUNE	
17	Webinar: Roundtable on the impact of COVID-19 on airlines and the passenger experience
18	StartAero 360° - Mid-year meeting
JULY	
2	Webinar: Glimpses of Light from the Bottom of a Pit (collaboration with Richard Aboulafia, Teal Group)
2	Webinar: Technical and Manual jobs (RRAM)
8-10	StartAero 360° - Consulting Clinic
9	Accelerator 360° - Mid-year meeting
16	Webinar: Actively Managing the answer to the COVID-19 pandemic (collaboration with Alix Partners)
20-24	Farnborough International Airshow (FIA) Connect*

DATE	EVENT
AUGUST	
11	Webinar: COVID-19 and the Outlook for MRO (collaboration with Kevin Michaels, AeroDynamic Advisory)
17-18	StartAero 360° - Training Tremplin
27	Webinar: COVID-19 and the Aerospace Supply Chain (collaboration with Aviation Week)
SEPTEMBER	
2	Webinar: 4.0 Skills Development: Sharing Best Practices with APN
10	Webinar: Can government make aviation sustainable? (collaboration with Aviation Week)
11	Accelerator 360° - Cash flow management in a crisis
14-15	StartAero 360° - Mission Eurosatory*
22	Webinar: Smart procurement: Leveraging commercial velocity for Defence (collaboration with Aviation Week)
OCTOBER 2020	
1	StartAero 360° - Trends & Opportunities
6-8	StartAero 360° - AUJVI XPONENTIAL 2020 virtual exhibition dedicated to autonomous systems (RPAS)*
7-8	Virtual job and training fair*
9	Unveiling of the results of the Study on the Perception of the next generation with regard to the aerospace industry
14	StartAero 360° - Follow-up Training Tremplin
19	2020 Symposium on the Canadian Defence and Security Market (5 th edition)
22	Opportunity Fair (4 th edition)*

DATE	EVENT
NOVEMBER	
2	Strategic Aerospace Forum - Collaboration with CCMM*
3-5	Unmanned Systems Canada*
6	Accelerator 360° - Market Development Training
12	StartAero 360° - Trends & Opportunities
17-18	StartAero 360° - Aviation Forum Hamburg*
19	Roundtable discussion on the innovation sector in connection with the US defence market
23-24	Training on the Canadian Defence Market
26	Maillage Aéro numérique Montréal Toulouse (led by the CRIAQ)
DECEMBER	
1-3	StartAero 360° - Aéromart Toulouse*
3-4	Training on the Canadian Defence Market
10	CCAA National Labour Market Strategy Forum 2020*
14-15	International Aerospace Innovation Forum 2020 (7 th edition)
16	Day on MRO and Defence & Security
16	Vitrines 2020: Major aerospace employment and training event
17	International Intercluster Meeting: How to support our ecosystems in the COVID-19 Pandemic environment?

INTERNATIONAL AEROSPACE WEEK MONTRÉAL 2020 //

From December 14 to 17, 2020, Aéro Montréal invited all the players in the Canadian and international aerospace industry to a unique 100% virtual event as part of International Aerospace Week - Montréal 2020.

With the safety of participants in mind, this new edition offered a large number of conferences and round tables. It also featured virtual business meetings adapted to the different needs of participants from all over the world.

INTERNATIONAL AEROSPACE INNOVATION FORUM //

International Aerospace Week - Montréal 2020 kicked off with the 7th edition of the International Aerospace Innovation Forum on the theme of "Smart Travelling Rethought." Participants were invited to board the green aircraft of the future. They were able to travel through different themes: the paradigm shift induced by the COVID-19 crisis and its effects on our industry or the transition to rethought travel. By covering the development of flying taxis, autonomous vehicles of the future and space technologies, Aéro Montréal offered participants a complete and promising vision of emerging Canadian technologies. This unique edition was also an opportunity to honour Japan for its interest, involvement and investment in the Québec economy.

Over
1,000
participants

60
world-class speakers
in 17 conferences

85
booths with
over 250
exhibitors

More than
450
business meetings
with the presence of
12 prime contractors



// **Valérie Plante**, Mayor of Montréal



// **Chantal Rouleau**, Member for Pointe-aux-Trembles, Coalition avenir Québec, Minister for Transport, Minister Responsible for the Metropolis and the Montréal Region



// **Suzanne M. Benoît**, President, Aéro Montréal



// **Grazia Vittadini**, Chief Technology Officer, Airbus, **Isabelle Hudon**, Ambassador of Canada to France



// **François Legault**, Premier of Québec



// **Pierre Fitzgibbon**, Québec Minister of Economy and Innovation



// **Nadine Girault**, Québec Minister of International Relations and La Francophonie



// **Yasushi Sasaki**, Chair of AICHI-NAGOYA AEROSPACE CONSORTIUM



// **Navdeep Bains**, Minister of Innovation, Sciences and Industry



// **François Legault**, Premier of Québec and **Denis Giangi**, Chair of Aéro Montréal and President of Rolls-Royce Canada



// **Éric Martel**, President and Chief Executive Office, Bombardier



// **David Brulotte**, Québec Delegate General in Tokyo, **Pierre Cardin**, Senior Vice President, Head of Public Affairs, **Daniel Silverman**, Vice President, Foreign Direct Investment, Investissement Québec International



MRO AND DEFENCE AND SECURITY DAY



The Aerospace Week was also an opportunity to bring together players from the MRO, Defence and Security sectors for a combined 100% virtual event on Wednesday, December 16. The event took stock of the impact of the COVID-19 crisis on the aerospace industry and the Canadian and American defence markets. It also helped to strengthen ties among the sector's players by mobilizing them around common innovation strategies. This unique event also served to stimulate collaboration and encourage partnerships between the various organizations.

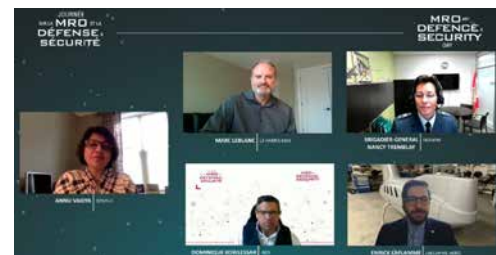
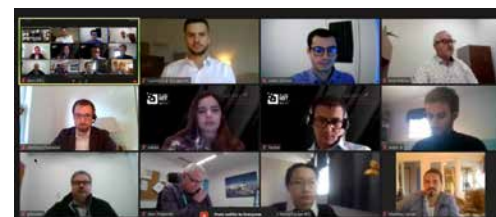
Over **350** participants

42 world-class speakers

More than **150** business meetings with the presence of 15 prime contractors



// **Marko Ivankovic**, Senior Project Manager, Icarus Aerospace



// **Annu Vaidya**, Business Development Manager, GDMS-C, **Marc LeBlanc**, Senior Director, Business Development, L3Harris Technologies, **BGen Nancy Tremblay**, DGGPEA, Royal Canadian Air Force, **Dominique Kowlessar**, Policy Director, Innovation, Sciences and Economic Development Canada, **Enrick Laflamme**, President, Laflamme Aéro

// **Pierre Vallée**, Advisor, Client Engagement, National Research Council Canada, **Eric Fournier**, Director General, IDEeS Program, Defence Research and Development, **Jean Giroux**, President, Telops, **David Ferris**, Director, LSI

VITRINES



On Wednesday, December 16, the 4th edition of the Vitrites event was also held. This 100% virtual experience aimed to highlight the many career, employment, internship and training opportunities currently available in Québec's aerospace sector. The event was a great opportunity to inform, prepare and reassure the next generation of workers, as well as experienced workers.

More than **1,100** participants

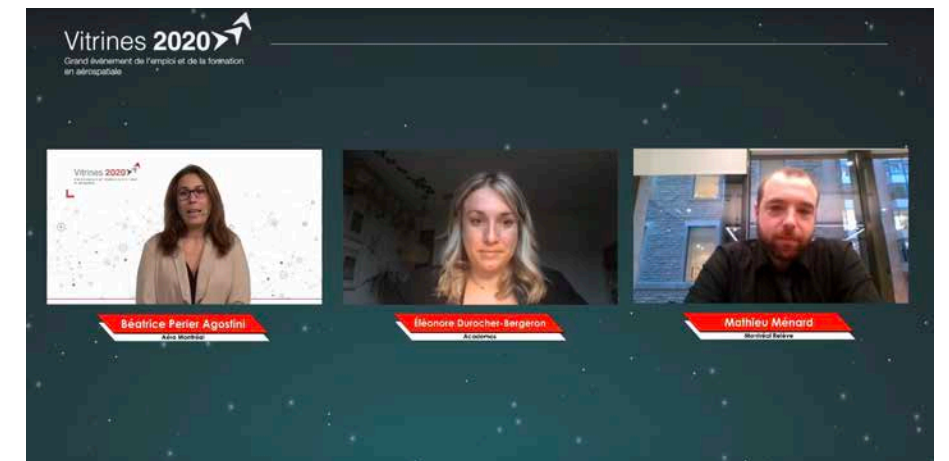
157 representatives from companies and training programs

26 speakers and panelists

9,400 virtual booth visits



// **Jean Boulet**, Minister of Labour, Employment and Social Solidarity



// **Béatrice Perier Agostini**, Director, Next Generation and Workforce, Aéro Montréal, **Éléonore Durocher-Bergeron**, Director of Operations, **Mathieu Mérard**, Coordinator of Partnerships and Projects, Montréal Relève

ACTIVITY
REPORT
2020



Québec



Canada

Editor: Aéro Montréal

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