



MONTRÉAL
WORLD
AEROSPACE
LEADER



AÉRO MONTRÉAL

THE SECRETARIAT OF GREATER
MONTRÉAL'S AEROSPACE CLUSTER

- **Aéro Montréal** is an industry-driven organization that brings together not only all the companies of Québec's aerospace industry, but also the educational and research institutions, the unions and the associations that contribute to the development of this strategic sector.
 - Its mission is to foster and maintain an environment conducive to increased productivity and accelerated growth in the aerospace sector. Aéro Montréal intends to make this industry a source of continuously growing wealth for Greater Montréal, Québec and Canada.
 - To achieve its objectives, Aéro Montréal has developed a strategic plan with five main thrusts: > Image, Visibility and Branding; > Human Capital and Workforce Renewal; > Sub-contracting; > Productivity, Performance and Competitive Intelligence; > Innovation. The plan calls for a series of structuring initiatives for each of these five thrusts.
- « **By creating Aéro Montréal, the industry players recognize the need to act in concert and to respond more quickly and more effectively to the strategic issues that concern them. >>**

Jacques St-Laurent

*Chairman of the Board of Aéro Montréal and
President of Bell Helicopter Textron Canada*



GREATER MONTRÉAL

ONE OF THE WORLD'S THREE LEADING
AEROSPACE CENTRES, ALONG WITH
SEATTLE AND TOULOUSE

A dynamic and competitive industry

- More than **240 companies**.
- Over **40,000 jobs**.
- **Sales of \$11.4 billion**, of which 80% are exports.
- **Ranked sixth in the world** based on sales.
- Core of the Canadian aerospace industry, accounting for **62% of Canadian production**.
- Greater Montréal offers the highest number of aerospace jobs in Canada, with almost **50% of the Canadian Aerospace industry's workforce**.
- Canadian leader in R&D: close to **70% of all Canadian Aerospace R&D** takes place in Greater Montréal.
- One of the only places in the world where almost all the components needed to build an aircraft can be found within a **30 km (19 miles) radius**.
- **Operating costs that are among the most attractive** of all the major metropolitan areas of North America.

ONE REGION, MANY WORLD LEADERS

THE GREATER MONTRÉAL AREA IS WELL KNOWN FOR ITS CUTTING-EDGE EXPERTISE IN THE DESIGN, MANUFACTURE, INTEGRATION, SERVICING AND REPAIR OF AIRCRAFTS, ENGINES, SIMULATORS AND SUB-SYSTEMS SUCH AS AVIONIC SUITES AND LANDING GEARS.

World-class OEMs

- **Bell Helicopter Textron Canada:** leader in the design, production and support of commercial helicopters.
- **Bombardier Aerospace:** third-largest manufacturer of civil aircraft and largest manufacturer of regional jets in the world.
- **CAE:** world leader in the field of simulation and modelling technologies, as well as integrated training services for civilian and military aviation.
- **Pratt & Whitney Canada:** world leader among engine-makers supplying business aircraft, general aviation aircraft, regional jets and helicopters.

Leading-edge equipment manufacturers and MROs

- **ACTS:** a renowned expert in the maintenance and repair of commercial aircraft.
- **CMC Electronics Inc.:** one of the world's foremost specialists in aerospace telecommunications.
- **Héroux-Devtek Inc.:** a world leader in the design, development, manufacturing, and full-service maintenance and repair of landing gears, aerostructures, and gas turbine components.
- **L-3 Communications MAS (Canada) Inc.:** a key player in the field of the maintenance and rebuilding of military aircraft.
- **Messier-Dowty Inc.:** a major manufacturing company specializing in very large, complex landing gears.





- **Rolls-Royce Canada Limited:** one of the great names in the repair of aircraft engines and the design of turbines for industrial use.
- **Sonaca NMF Canada:** world leader in the manufacturing of wing panels for regional and business jets, including machining, peen forming and assembly.
- **Thales Canada:** a leading manufacturer of integrated systems used in the cockpits and flight controls of civilian aircraft.
- **Turbomeca Canada:** a key player in the maintenance, repair and overall (MRO) of helicopters engines and components.

Sub-contractors and suppliers on a par with the world's best

- The aerospace OEMs are supported by more than 220 SMEs in the Montreal and surrounding area offering a range of products and services that cover the whole spectrum of aircraft production, assembly and maintenance: machining, software, surface treatment, composite material, shot peening, rapid prototyping, hydraulics, avionics, electro-optics, etc.
- The majority of sub-contractors are ISO 9000 accredited, with 90% of sectorial production meeting these industry standards. A growing number of companies are also obtaining AS9100 and NADCAP certifications.

- The Québec Aerospace Association (AQA) is the largest provincial aerospace association in Canada. It represents and assists Québec SMEs.

An abundance of qualified and competitive human capital

- Montréal is home to the largest pool of engineers in the country with over 50,000 engineers of which 9,000 work in the aerospace industry.
- Montréal also boasts the highest concentration of qualified aerospace technicians, machine operators and assembly workers in the country.
- Montréal's aerospace companies engage in a fruitful partnership with three specialized unions: the IAMAW, the CEP and the CAW-Canada.

Educational institutions unique in the world

- The École des métiers de l'aérospatiale de Montréal (EMAM) (Aerospace Trade School of Montréal), a vocational training institution equipped with a 9,755 m² plant and a machinery inventory worth \$25 million, offers specialized programs such as: electrical assembly, machining techniques, surface treatments, etc.



- The École nationale d'aérotechnique (ÉNA) (National Aerotechnical Institute), the largest in North America, which operates cutting-edge equipment and aircraft (a fleet of 23 planes) worth over \$50 million. The institute offers three leading programs in avionics, aircraft assembly and maintenance.
- University programs in aerospace engineering in partnership with major local aerospace companies: Concordia, Laval, McGill, Sherbrooke, École Polytechnique and École de technologie supérieure.
- An exceptional vocational and university training infrastructure, whose annual graduating population of around 3,600 (2,800 engineers and scientists, 450 technicians and over 400 operators or assembly workers) has the necessary expertise to immediately enhance an already remarkable pool of qualified aerospace resources.
- In addition to promoting careers in aerospace, the CAMAQ (Comité sectoriel de main-d'œuvre en aérospatiale) ensures close ties between the sector's businesses and the educational system (trade schools, technical schools and universities) in order to train and develop human capital.

Exceptional innovative capabilities

- The majority of Canada's company-based centres of excellence.
- The Consortium for Research and Innovation in Aerospace in Québec (CRIAQ), a unique innovation network fostering collaboration between industry and universities on pre-competitive research projects.
- Four universities with a worldwide reputation for aerospace research:
 - Concordia University, Faculty of Engineering
 - McGill University, Faculty of Engineering
 - École Polytechnique de Montréal
 - École de technologie supérieure

- In 2004, Montréal was first in Canada in terms of the number of public research centres it hosted. Montréal's aerospace industry boasts more than 10 public and parapublic research centres with international reputations. They include:
 - The Canadian Space Agency (CSA)
 - The Aerospace Manufacturing Technology Centre (NRC-AMTC)
 - The Industrial Materials Institute (NRC-IMI)
 - The Centre technologique en aérospatiale (CTA)
 - The Centre de développement des composites du Québec (CDCQ)

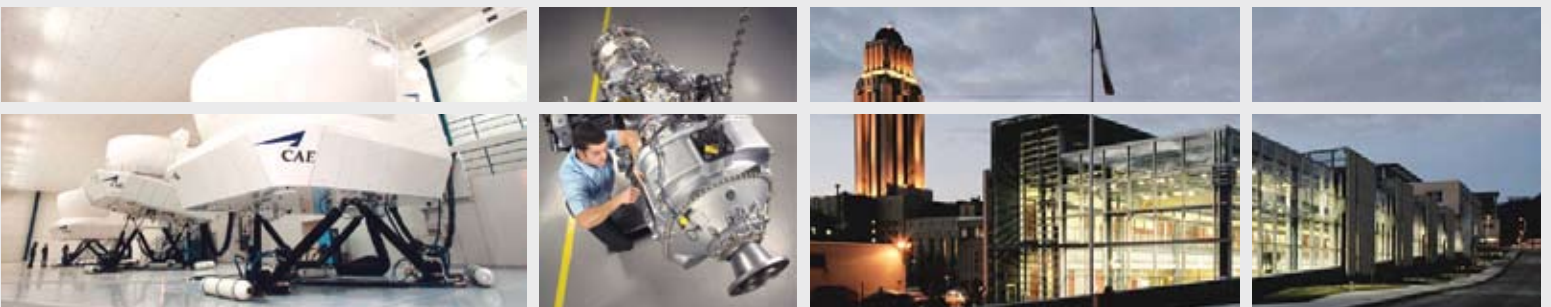
Several headquarters of international aviation organizations

Key international aviation organizations have chosen to locate their headquarters in Montréal. They include:

- The International Civil Aviation Organization (ICAO)
- The International Air Transport Association (IATA)
- The International Business Aviation Council (IBAC)

« Aéro Montréal enables a better integration of the sector's and the industry's various players, which is important to Bombardier Aerospace, given our significant presence in the Greater Montréal Area. »

Pierre Beaudoin
President and COO
Bombardier Aerospace





ORGANIZATIONS ON THE BOARD OF DIRECTORS:

OEMs

- Bell Helicopter Textron Canada
- Bombardier Aerospace
- CAE
- Pratt & Whitney Canada

Equipment manufacturers and MROs

- ACTS
- CMC Electronics Inc.
- Héroux-Devtek Inc.
- L-3 Communications MAS (Canada) Inc.
- Messier-Dowty Inc.
- Rolls-Royce Canada Limited
- Thales Canada Inc.
- Turbomeca Canada Inc.

Sub-contractors

- ExelTech Aerospace
- Placeteco Inc.

Institutions and Associations

- Quebec Aerospace Association (AQA)
- Comité sectoriel de main-d'œuvre en aérospatiale (CAMAQ)
- Consortium for Research and Innovation in Aerospace in Quebec (CRIAQ)
- École des métiers de l'aérospatiale de Montréal (EMAM)
- École nationale d'aérotechnique (ÉNA)
- Fédération des travailleurs du Québec (FTQ)
- Institute for Aerospace Research (NRC-IAR)



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