2017 Annual Report

LOOKING TO THE FUTURE
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Here to Serve You

At AIAC, we take our responsibility to you, our members, very seriously. We’ve been working hard as an association for over 50 years – building up knowledge, credibility and most importantly, delivering results.

This report provides a look back at some of the highlights and achievements we delivered in 2017. As you’ll see, we achieved important results for our members on many fronts. Our advocacy on your behalf drove improvements and modernization in the public procurement system and helped create new solutions for small and medium-size enterprises. We also provided business development opportunities throughout the year for our members, both at home and in the global marketplace.

And yet, 2017 was also a year of disappointment on multiple fronts. Changes to innovation programming forget or ignore the realities facing Canada’s most innovative industry. The future of Canada’s space sector is in peril without urgent action. All of these challenges undermine our economic leadership and are negatively impacting bottom lines, jobs, and investment for many of our members.

As your association, we’ve heard your concerns. We know your priorities. And we know many of those priorities were not reflected at the federal level, despite our numerous efforts.

It’s time for a new dialogue and a new vision for the future of aerospace in Canada – one that leverages our economic leadership, world-class workforce, and transformative technologies to create opportunity and change for all Canadians.

As your association, we know this will require a lot of hard work. To that end, we’ve already started strengthening much of the work we do on your behalf. Our technical committee work has been expanded; we’ve enhanced our communications and outreach; and we’ve increased the presence of Canadian industry at events we host here in Canada and at key international air shows and trade missions each year. And we’ll continue to do more.

AIAC is here to serve and support you. We’re committed to providing a valuable return on your investment to grow your business and increase your visibility within the industry. We’re committed to leading a new dialogue at the federal level that will bring about the change we know you want and deserve. Thank you for continuing on this journey with us.

Jim Quick
President & CEO, AIAC
Looking Forward

This is both an exciting and challenging time to be part of the global aerospace industry. As players in a global industry, we are constantly adapting to changes in the economy, trade, supply chains, the workforce, and the marketplace. Disruptive and transformative technologies such as urban air travel, on-demand mobility and artificial intelligence are revolutionizing the industry, forcing us to think outside the box and consider how we might work with and appeal to non-traditional aerospace partners, suppliers, customers and increase diversity amongst our workers.

And while Canadian industry and their government partners have proven adept at meeting these challenges in the past, more than ever before we need a strong, committed partner at the federal level to continue working alongside us to ensure we don’t lose our competitive edge. Around the world, more and more governments are increasing their investments in their aerospace and space sectors, confident that those investments are the key to their future prosperity and advancement. Canada just cannot afford to see its aerospace industry fall behind. There are much more innovation, economic, and public benefits this industry can offer to Canadians.

Now, more than ever, AIAC is vitally important. We need an advocate to speak on behalf of industry as a whole. Jim and the strong team he’s put together are ready to lead a new dialogue for change.

They are our voice to government, pushing for the programs and policies we need to enhance our global competitiveness and leadership. They have the access and credibility essential to making sure the government clearly hears and understands our concerns.

You, our members, are also essential to the AIAC’s success. We have established a solid governance and cadence around our Board and Committee structure allowing you to share your experiences, challenges and successes, which are key for our federal leaders’ ability to help us and make a difference.

As you look ahead, know you will not be facing these challenges alone. You have a strong partner in AIAC who is listening to you and who is ready to do the heavy lifting on your behalf. Together we will harness our potential for growth, leading to increased prosperity for our members, for our sector, for Canada and for Canadians as a whole.

Cynthia Garneau
President, Bell Helicopter Textron Canada
POLICY UPDATES
How We’re Working for You
INNOVATION & TECHNOLOGY

Keeping Canada Ahead of the Curve

CANADA’S AEROSPACE SECTOR IS A NATIONAL and global innovation leader. Constantly pushing the boundaries, Canadian aerospace companies outpace other national manufacturers in all types of innovation practices and develop twice as many new technologies. As an association, we recognize that innovation is essential to the long-term competitiveness of our sector – including strong government programs and policies designed for the realities of aerospace innovation.

In 2017, AIAC and our Innovation and Technology Committee achieved the following:

• Significantly shaped the design of three new government programs: the Strategic Innovation Fund, the Impact Canada Initiative and Innovative Solutions Canada. Our advocacy efforts pushed for programming that will serve the needs of aerospace in terms of efficiency and clarity.

• Through our in-depth knowledge of government services and programming, AIAC helped members access federal funding available to grow their business and become more globally competitive.

• Through three webinars, over 60 members and partners heard about the latest developments in three innovation areas experiencing unprecedented growth: unmanned systems, process innovation and digital technologies.
We also brought together important stakeholders across industry sectors through on-the-ground events such as an Ontario Innovation Roundtable in Toronto and an Investment Roundtable in Calgary.

However, we also have concerns. Although innovation is touted as a government priority, the priorities of aerospace companies – Canadian manufacturing’s largest R&D investor – are being sidelined. As your voice to government, AIAC is committed to making your voice heard on innovation policy and program development, so that Canada continues to offer a business environment where aerospace innovation thrives.

Looking forward to 2018, members can expect AIAC to:

- Release the results of an important survey on investment factors in Aerospace.
- Press elected representatives and government officials to ensure the realities and challenges faced by Canada’s aerospace sector are taken into account in the further development of their Innovation and Skills agenda.
- Foster further collaboration and dialogue between industry and research consortia.

Jim Quick, President & CEO, AIAC (left) with incoming AIAC Board Chair Cynthia Garneau, President, Bell Helicopter Textron Canada (centre) and outgoing AIAC Board Chair David Gossen, President, IMP Aerospace and Defence (right).
THE IMPACT OF SPACE IS FELT IN VIRTUALLY
every facet of our lives. From ensuring our
sovereignty and security, to predicting weather
patterns and tracking natural disasters, to simply
accessing the internet and using our cell phones –
space is a crucial part of our daily lives and wellbeing.

Over the past year, we focused on the development
of an innovative and sustainable vision for Canada’s
future in space.

- At our urging, the government created a
  Space Advisory Board to provide advice and
  recommendations regarding the development
  of a space plan for Canada.

- Through AIAC’s Space committee, we worked
closely with the Space Advisory Board and
government officials to develop and advocate
for the successful adoption of this space plan.

- We developed and implemented an advocacy
  plan targeting a broad group of political decision-
makers such as Members of Parliament, Ministers,
  and ministerial staff, educating them on the
  impact of Canada’s space sector on their files and
  constituents and the need for a long-term plan.
In September, we hosted a Day on the Hill that raised awareness about the essential contributions space makes to the daily lives of Canadians and included an exclusive conversation with five past and present Canadian astronauts.

To our extreme disappointment, the necessary federal commitment to our sector has yet to come. We are at a crucial point as a nation. Massive global growth and investment in space worldwide means that Canada must act now to reverse the decline in Canada’s space capability – before it’s too late.

To that end, AIAC will:

- Mount a public outreach campaign to educate Canadians on the need for a world-class space program and its essential contribution to their lives and communities.
- Continue to press elected representatives, through direct advocacy and larger industry events, to take immediate action on the introduction of a long-term space plan.
- Be the voice for members and industry regarding the corrosive effect the lack of a long-term plan is having on Canada’s reputation and presence in space.
THE END GOAL OF ANY PUBLIC PROCUREMENT system must be an efficient, transparent process that meets Canada’s needs. At AIAC, we know that fostering competition and industry engagement go hand in hand with enhancing industrial capacity and capability.

As a trusted partner to the government, our messages continue to be heard:

• The government released its new defence policy, *Strong, Secure, Engaged (SSE)*. AIAC was at the table early and consistently during its development, and our message was heard: SSE is clear that a healthy domestic defence industry is an important part of the government’s ability to keep Canadians safe.

• AIAC joined forces with government on several initiatives to help companies that work for the federal government. Advances in electronic bid submissions will make it easier to bid on procurements, and a new government call centre will speed up security clearance processing.
Additionally, the government continued to depend on AIAC’s knowledge and industry reach as it modernised its public procurement system. We played a leading role in the development of Key Industrial Capabilities, ensuring prime suppliers will receive clear criteria about what will give them a competitive advantage as they develop their bids.

Going forward, AIAC will:

• Work closely with government on the implementation of the new defence policy to ensure the goal of a healthy defence industry is advanced.

• Continue to be an active partner with government on major procurements such as the Future Fighter Capability Program and Future Aircrew Training procurement processes to ensure open, collaborative engagement with potential bidders and suppliers.

• Closely monitor the government’s overall procurement modernisation efforts, specifically the move to an e-procurement system and the development of a vendor performance management system.
CANADA IS AN ESTABLISHED LEADER IN CIVIL aviation. Maintaining this leadership during a time of robust growth requires an ongoing commitment to protect our competitive advantage.

To do this, we must eliminate barriers to growth. In 2017, AIAC worked with decision makers at the highest levels to develop regulations and bilateral agreements that give Canadian industry its best shot at success.

- An adequately funded Civil Aviation branch at Transport Canada is critical for the continued viability of Canada’s civil aviation sector. In 2017, AIAC successfully advocated for an increase in its budget so it can continue doing its important work.

- A favourable regulatory environment is key to helping our members take advantage of the booming opportunities in maintenance, repair and overhaul. To that end, AIAC successfully advocated on behalf of a member which resulted in a proposed amendment to the FAA-TCCA maintenance bilateral agreement.
• Navigating civil aviation’s complex regulatory environment for the benefit of Canadian industry requires collaboration and cooperation worldwide. In partnership with the government, AIAC hosted international meetings in Ottawa attended by Transport Canada, the Federal Aviation Administration, the National Civil Aviation Agency of Brazil, the European Aviation Safety Agency and 30 global industry representatives. These meetings resulted in considerable progress to streamline the flow of aerospace products across international boundaries.
Over the next year, AIAC will:

• Work with governments, agencies and partners to identify new ways to help civil aviation manufacturers and service providers bring their products and services to market quickly and effectively.

• Host a Transport Canada Civil Aviation Delegates’ Conference in conjunction with the AIAC Canadian Aerospace Summit November 13 – 14, 2018.

• Represent the interests of AIAC members at international regulatory forums.

“We are a Western Canadian manufacturing and machining company and have been making products for the energy sector for over 40 years. We were seeking to diversify our business beyond the oil and gas industry, and the aerospace and defence sectors were a good match with our capabilities. Because of the complexities in these sectors, I was looking for an organization or association that could help me navigate and understand the relationships between government and the A&D industries. AIAC seemed to me to be the right choice – and they have not let me down. From the moment I called to inquire, I was taken care of with the highest level of service. Since joining, I have received access to key industry events, started connecting with industry and government, and gotten better insight into how Apollo can establish itself in the marketplace. It has been an excellent start to our process.”

Rob Gummer
Export & Diversification Manager, Apollo Machine & Welding Ltd.
Aerospace is a truly global industry, and our members have facilities and operations all over the world. The Canadian aerospace sector is an international leader in exports and trade diversity, exporting over 80 percent of its product to destinations across the globe.

AIAC works closely with government to reduce barriers to trade and support our members’ international business development.

- In 2017, AIAC successfully advocated for Canadian aerospace companies on various export control issues and related matters.

- Canada and Japan signed a maintenance agreement streamlining certifications and thereby reducing costs incurred by Canadian aerospace and aviation companies. The agreement makes Canada more competitive in the Japanese market and members report that their business opportunities have already increased.
Building on this success, AIAC will continue to:

- Support our members and voice their concerns on barriers to trade, working with our federal and international partners to bring about solutions.
- Develop programs that ensure trade policy supports the growth and competitiveness of Canadian aerospace companies, products, and services in the global marketplace.

Jim Quick, President and CEO, AIAC, gives an interview at the Paris Air Show in June 2017.
Employment in the aerospace industry has been steadily increasing. Due to growth in the size of existing employers and the continuing creation of new businesses, there’s a definite need for quality, skilled workers. AIAC understands the importance of connecting the right people with the right jobs. We also recognize Canada’s unique position to lead when it comes to establishing global standards for safety and quality.

Here’s a look at 2017:

- Having created the labour market committee, we began our work to align federal labour policy with the skills required for the Canadian aerospace workforce.

- AIAC Pacific, our regional branch in British Columbia, partnered with the provincial government on a labour market study about workforce challenges. Phase one involved industry engagement, and the recently completed phase two involved compiling the data into major findings and conclusions.
In 2018, you can expect:

- AIAC’s members, through the committee, to continue working through a plan to help develop industry positions on forward looking labour market agreements, enterprise sustainment and employment policies.
SMALL AND MEDIUM-SIZED ENTERPRISES (SMEs) are a significant contributor to Canada’s aerospace industry and are vital to our global competitiveness. They also face unique challenges when it comes to scaling up and securing a competitive advantage. AIAC recognizes that these challenges, inherently linked to their size, should not limit their growth or opportunities to access the global marketplace.

2017 was the culmination of many years’ worth of advocacy by AIAC and our members, resulting in several new programs and initiatives to support SMEs. These include:

- **Innovative Solutions Canada**: New program announced that supports the scale up and growth of Canada’s innovators and entrepreneurs.

- **Strategic Innovation Fund**: Consolidated previous Strategic Aerospace and Defence Initiative with terms and conditions more accessible to small businesses.

- **Build in Canada Innovation Program**: Program expanded, allowing more members to work with the government as a first customer and accelerating the introduction of their cutting edge goods and services into the marketplace.

“My company recently joined AIAC and the SME small business committee. The association recognizes the importance of small business and works diligently to address our problems/concerns with senior members of government. The connection with the OEM community is equally important to small business and the association provides the forum for all of us to interconnect.”

*Barney Bangs*
President, Tulmar
• Office of Small and Medium Enterprises (OSME): Improved the way contractors are paid, recognizing small businesses that may be sensitive to cash flow.

• Accelerated Growth Strategy: AIAC was the first and only industry association to become a nominating partner and several AIAC members have benefited from the program.

Additionally, at AIAC we know that increasing the capacity of SMEs allows them to be part of a robust and international supply chain. We’ve taken a leadership role with our Small Business Committee’s consortia model of business development. This best practice model of small businesses partnering to improve their offerings is being implemented and seeing results.
We expect the rapid pace to continue over the next year. In 2018, AIAC will:

- Closely monitor the roll out of these new programs and continue to work in close partnership with government to ensure the programs reach their full potential and serve the needs of our sector.
- Continue to advocate on behalf of SMEs when it comes to the Innovation and Skills plan. AIAC will ensure the competitiveness of Canadian aerospace is a priority for government so that SMEs have the tools and resources necessary to succeed.
SERVING OUR MEMBERS
EVERY YEAR, AIAC HOSTS TWO WORLD-CLASS events. In 2017, the Canadian Aerospace Summit and the Aerospace, Defence & Security Expo (ADSE) reinforced their reputation as the most important industry shows to attend in Canada each year.

The 2017 Canadian Aerospace Summit featured an impressive lineup of industry leaders, business experts and federal ministers including the Honourable Navdeep Bains, Minister of Innovation, Science and Economic Development; the Honourable Carla Qualtrough, Minister of Public Services and Procurement; and a panel of Parliamentary Secretaries. With a program that included over 1000 exhibitors and participants, an industry-leading trade show, B2B networking opportunities, and presentations from world-leading aerospace companies, the Summit was the place to be for companies wanting to succeed and grow in the global aerospace industry.
The 7th annual Aerospace, Defence and Security Expo (ADSE) broke attendance records in 2017 with a sold-out trade show, a line-up of high-profile speakers and a significant government funding announcement by the Honourable Harjit Sajjan, Minister of National Defence.

Held side-by-side with the Canadian Business Aviation Association’s (CBAA) annual convention and exhibition, ADSE’s combined delegates totaled over 1,000 and included senior industry, government and military representatives from across Canada and around the world. Keynote speakers included the Honourable Bruce Ralston, BC’s Minister of Jobs, Trade and Technology, who chose this event to deliver his first speech as Minister; Lieutenant-General Michael Hood, Commander of the Royal Canadian Air Force; and Brigadier-General Michel Lalumiere, Director-General of Air Force Development. Minister Sajjan closed the conference with an announcement of more than $320,000 to support Western Canadian presence at aerospace events in 2017 and 2018.

AIAC is busy planning for even bigger and better events in 2018. With your participation we will continue to soar to new heights!
BUSINESS DEVELOPMENT

At AIAC, we measure our success by our ability to help you, our members, gain an edge in the highly competitive global aerospace industry. Attending global tradeshows and exhibitions means having access to the latest technology, market intelligence, industry experts and networking opportunities. These experiences can set your business apart.

As part of our mandate, we facilitate, participate in and coordinate the presence of Canadian industry at key international air shows and trade missions each year. Whenever possible, we negotiate a reduced registration rate and provide rebates for Canadian participants.

In 2017, the events included:

- Additive Manufacturing Forum
- Satellite Conference & Exhibition
- Paris Air Show
- Pacific Northwest Aerospace Alliance 2017 Conference
- Heli-Expo
- China Helicopter Expo

Dr. Eric Ducharme, General Manager, Advanced Technology Operation, GE Aviation speaks at the Canadian Aerospace Summit.
Next year, AIAC will:

- Continue to build on our success of raising the profile of Canadian aerospace companies both at home and abroad.
- Provide a forum for AIAC members to build and strengthen business relationships with industry leaders, including through the use of AIAC’s technical committees.
- Further enhance your experience as a member through increased communications and outreach on online platforms and social media about policy, regulatory and global news and events affecting the industry.

Iain Christie, Executive Vice President, AIAC (back row, third from left) represents the association at a stakeholder panel with the Economic Development Bank of Canada (EDC) in May 2017.
The Voice of the Industry

AIAC represents the interests of Canada’s aerospace industry on a range of high-profile committees, boards and groups.

- Aerospace Industries Association (USA) Civil Aviation Regulatory Standards Committee (CARS)
- Canadian Aeronautics and Space Institute
- Canadian Council for Aviation and Aerospace (CCAA)
- Canadian Chamber of Commerce Association Roundtable
- Canadian Manufacturing Coalition
- Canadian Space Agency - Industry Joint Working Group Steering Committee
- Consortium for Aerospace Research and Innovation in Canada (CARIC, an organization co-founded with AIAC)
- European Aviation Safety Agency (EASA) Stakeholder Advisory Board (SAB)
- Federal Border Coalition
- General Aviation Manufacturers Association (GAMA) Technical Policy Committee (TPC)
- Government of Canada Controlled Goods Industry Engagement Committee
- Government of Canada Defence Industry Advisory Group
- Government of Canada Industrial Security Advisory Board
- Government of Canada Supplier Advisory Committee
- Government of Canada Sustainment Initiative Steering Committee
- Green Aviation Research and Development Network (GARDN)
- Industry-College Coalition
- International Coordinating Council of Aerospace Industries Associations (ICCAIA)
- Technology Demonstration Program Advisory Committee (TDP)
- Telfer Complex Projects Advisory Group
PARTNERSHIPS WITH GOVERNMENT

OUR PHILOSOPHY AT AIAC IS THAT ADVOCACY is not enough. We go further. We’ve earned influence through our 50 years as a key public policy partner with governments and the portal by which stakeholders engage with the industry. As a result, our members gain access to policy makers at the highest levels of government, as well as key influencers and decision-makers within the aerospace industry.

Some highlights of 2017 include:

• A record number of federal ministers as part of the Canadian delegation at the Paris Air Show.

• Renewed funding through the federal Government’s Global Opportunities for Associations (GOA) program, a funding mechanism we use to advance our members’ ability to target new international business opportunities.

• Increased member access to the services and assistance of the Trade Commissioner Service (TCS) through our partnership with TCS and the presence of Simon Gittens, a veteran Trade Commissioner who is embedded in AIAC’s Ottawa office.

Jim Quick, President and CEO, AIAC (far left), moderates a discussion with (left to right) Hon. Navdeep Bains, Minister of Innovation, Science and Economic Development; Hon. Marc Garneau, Minister of Transport; and Steven MacKinnon, Parliamentary Secretary to the Minister of Public Services and Procurement, at the Paris Air Show in June 2017.
• Renewal of our funding agreement with Western Economic Diversification Canada (WD). AIAC invests these funds to deliver direct results for our members. We’ve maximized global exposure and created business development opportunities for western Canadian companies at international aerospace events including PNAA, the Farnborough International Airshow, and AIAC’s Aerospace, Defence and Security Expo (ADSE).

• Another successful year for AIAC Pacific, our B.C. regional office headquartered in Vancouver and established four years ago. In a testament to the constructive partnership forged with B.C.’s provincial government during a transition period, the Honourable Bruce Ralston, BC’s Minister of Jobs, Trade and Technology, chose ADSE to deliver his first speech as Minister. The Honourable Harjit Sajjan, Minister of National Defence was also a keynote speaker at our record-setting event and announced WD funding.
The completion of another phase of AIAC’s labour market study in partnership with the B.C. government. In phase one, we engaged industry on a number of workforce development challenges they face. At the end of 2017 we were nearing the end of phase two, which involves compiling the data into major findings and conclusions setting the stage for phase three, the development of an effective labour market strategy.

“We view our membership in the AIAC as an essential part of our own strategy to promote our brand and strengthen our standing in the international arena. As competition from around the world increases, it’s even more important for the AIAC to maintain its advocacy role to help bolster Canadian aerospace and raise its profile with key stakeholders.

As the collective voice of our industry, the AIAC’s inputs have helped shape public policy and advance the needs of Canada’s aerospace community.

We believe that we are a more robust industry as a result of the efforts of the AIAC and as a member, UTC Aerospace Systems will continue to support the Association as it promotes Canada’s aerospace interests domestically and internationally.”

Tim Whittier
Director, Government Relations – Landing Systems, UTC Aerospace Systems
A STRONGER ASSOCIATION
OPERATIONAL AND FINANCIAL SUSTAINABILITY

AIAC IS COMMITTED TO RUNNING OUR association as efficiently as possible. Over the past five years we’ve assembled an experienced team and an impressive board of directors to ensure high standards of financial accountability and decision-making.

Together, we’re implementing best practices and procedures to ensure a stronger and more effective AIAC for years to come.

• Ensuring our financial sustainability means diversifying our revenue streams. We’ve increased our focus on generating revenue through partnerships and the hosting of events such as ADSE and our Canadian Aerospace Summit. Both of these world-class events have grown in size and scope featuring robust speakers, industry leaders, networking opportunities and impressive line-ups of federal ministers and parliamentary secretaries.

• AIAC is working with a new governance committee to review governance best practices and develop the right policies and procedures for our association.

The Summit’s Master of Ceremonies, Helene V. Gagnon, Vice President, Public Affairs and Global Communications, CAE.
• We continue to grow our membership. Bringing more voices together makes us all stronger.

• Our goal is to ensure you get a solid return on the investment you make in us. Over the next year we’ll continue increasing AIAC’s sustainability and maximizing returns for our members.

AIAC Member Committees – Get involved to get results!

AIAC’s technical committees are central to AIAC’s policy and advocacy functions. Members of these committees provide industry insights and guidance with respect to issues related to specific industry segments or topics of concern or interest. Each committee is chaired by a member of the AIAC board and staffed by an AIAC executive. Membership on these committees is open to AIAC members and partners only. To join any of these committees, please contact the AIAC staff lead indicated for that committee.

CIVIL AVIATION
Staff Contact: Mark Beauregard, Vice President, Regulatory Affairs

PUBLIC PROCUREMENT AND DEFENCE
Staff Contact: Iain Christie, Executive Vice President

LABOUR MARKET
Staff Contact: Iain Christie, Executive Vice President

MARKET ACCESS
Staff Contact: Mark Beauregard, Vice President, Regulatory Affairs

SPACE
Staff Contact: Iain Christie, Executive Vice President

SMALL BUSINESS
Staff Contact: Iain Christie, Executive Vice President

TECHNOLOGY AND INNOVATION
Staff Contact: Guillaume Côté, Vice President, Technology & Innovation
President & Chief Executive Officer
Jim Quick

Executive Vice President
Iain Christie

Vice President, Strategic Partnerships
Bill Yetman

Vice President, Technology & Innovation
Guillaume Côté

Vice President, Regulatory Affairs
Mark Beauregard

Vice President, AIAC Pacific (Operations & Communications)
Mike Mueller

Vice President, AIAC Pacific (Policy & Government Relations)
Taylor Briggs

Senior Director, Communications & Marketing
Kristen VanderHoek

Director, Operations and Member Services
Lynne Adamson

Manager, Government Relations and Policy Development
Darya Dolzikova

Executive Support & Special Projects
Marie-Soleil Jones

Controller & Corporate Secretary
Patrick Girard

Accounting Assistant
Wendy Hughes

Trade Commissioner – Aerospace (embedded)
Global Affairs Canada
Simon Gittens

Parachutists display the Canadian flag at the opening of the Twilight Dinner and the Abbotsford Air Show.