

Downsview Aerospace



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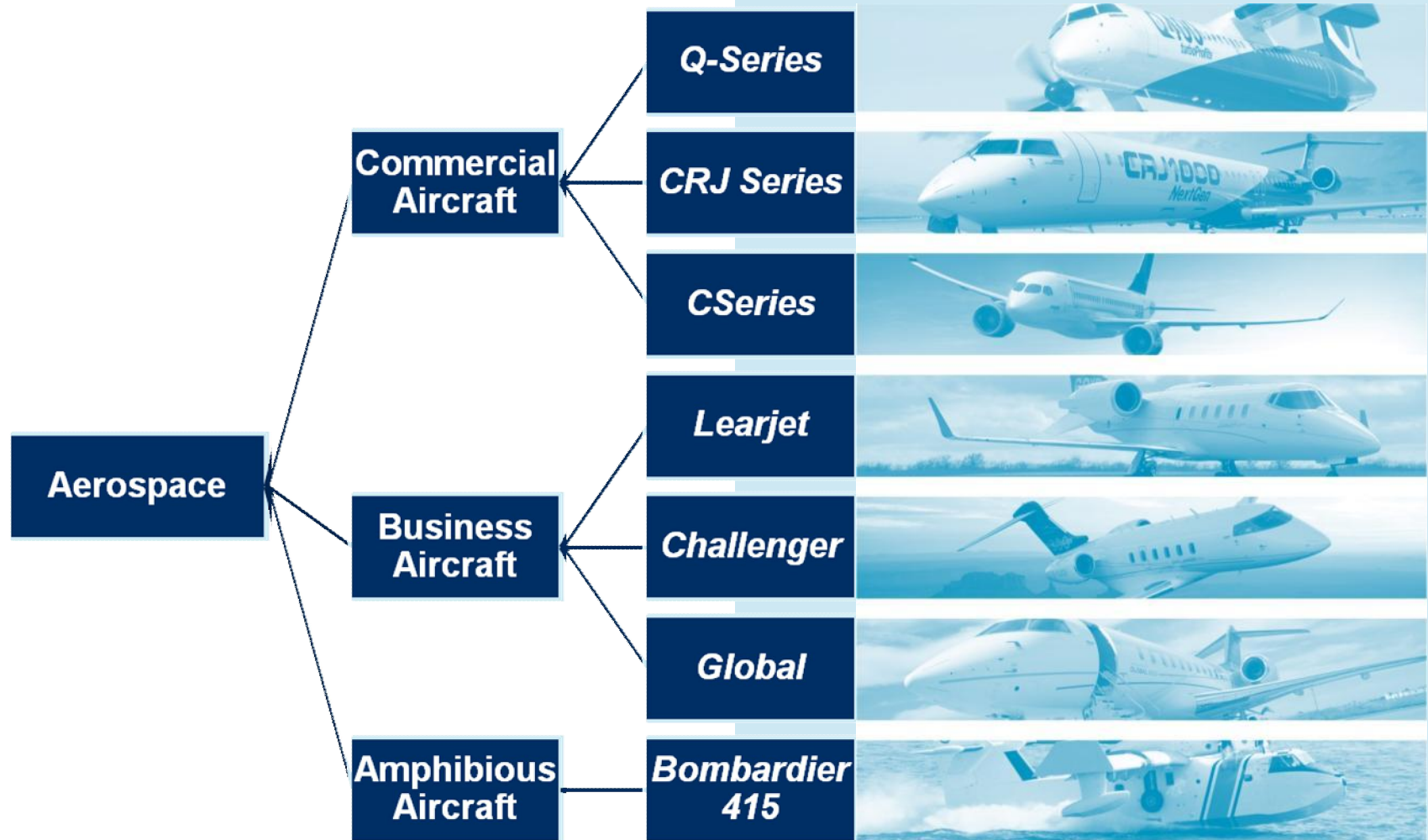
BOMBARDIER



Every **3 seconds** a
Bombardier aircraft takes off
or lands around the globe.

BOMBARDIER

Bombardier Aerospace is a World Leader in Aerospace Products and Services



Bombardier, Challenger, Learjet, Global, Bombardier 415, Q-Series, Q400, CRJ Series, CRJ700, CRJ900, CRJ1000, CRJ, NextGen, CSeries, CS100 and CS300 are registered Trademarks or Trademarks of Bombardier Inc. or its subsidiaries.

BOMBARDIER

Toronto Site

- **157,935** square-metre facility located on **150** hectares of land, with a **2,130** metre active runway
- **Delivered** close to **100** aircraft in fiscal year 2010-11
- **Generates** over **9,000** direct, indirect and induced jobs, **\$60 million** in tax revenues and **\$2.7 billion** in economic output for Ontario annually
- **90%** of production exported



BOMBARDIER

Bombardier Aerospace's presence in Ontario



One business unit
headquarters Toronto

Two state-of-the-art
manufacturing facilities
Toronto, North Bay

One engineering, R&D
and testing facility Toronto

One customer support
centre Toronto

BOMBARDIER

Bombardier Aerospace's presence in Ontario



Directly employs over **4,000*** people – **17%** of Ontario's aerospace employment

Well-paid, highly skilled employees contributing to **five** successful aircraft programs

* Approximately 2,500 unionized employees

BOMBARDIER

The Best Regional Aircraft Solution – Q400 NextGen – Built in your backyard!

- ✓ \$30 million (US) list price
- ✓ Over 90% of Q400 NextGen Aircraft exported
- ✓ 54 Q400 and Q400 NextGen deliveries in calendar year 2011*
- ✓ 50% delivery market share for 20-99 seat turboprops**
- ✓ Bombardier will deliver the 400th Q400 in 2012
- ✓ Porter Airlines used a Bombardier Q400 turboprop airliner to conduct first biofuel-powered revenue flight in Canada in April 17th, 2012



* Bombardier Annual Report, calendar year ended Dec. 31, 2011

** Calendar year 2011 delivery market share, Annual Report, Fiscal year ended Dec. 31, 2011

BOMBARDIER

The Global Aircraft Family – Built in your backyard!

Ultra long-range, high speed business jets



- ✓ Completed list price (US) - Global 5000: \$49.1M; Global 6000: \$57.5 M
- ✓ Over 90% of Global 5000 and Global 6000 aircraft are exported
- ✓ 53 Global aircraft deliveries in calendar year 2011*
- ✓ 38% delivery market share in the large jet market segment*
- ✓ Celebrating delivery of 500th Global business jet in 2012

* Calendar year 2011 delivery market share , Annual Report, Calendar year ended Dec. 31, 2011

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Toronto Site **Awarded Global 7000 and Global 8000 Aircraft Final Assembly**



BOMBARDIER
GLOBAL 7000

- Range at M 0.85: 7,300 nm
- Range at M 0.90: 5,100 nm
- 20% larger cabin (4-zone)
- EIS: 2016



BOMBARDIER
GLOBAL 8000

- Range at M0.85: 7,900 nm
- Range at M0.90: 5,650 nm
- 4.5% larger cabin (3-zone), new design
- EIS: 2017

BOMBARDIER

Working with over **150** project-related suppliers in **Ontario**, generating over **\$540 million** in business*



Cantwell Cullen and Company Incorporated



WOODBINE METAL SPINNING



* In 2011, includes indirect goods and services suppliers



Partnering with world-class institutions to provide leading-edge aerospace education and training as well as facilities for advanced R&D



UNIVERSITY OF
TORONTO



RYERSON
UNIVERSITY



Professional Engineers
Ontario



Transport
Canada

Transports
Canada



BOMBARDIER

Partnering with world-class institutions to develop a state-of-the-art training facility



Signed MOU with Centennial College to become the Trainer of Choice for Bombardier's Toronto Site

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Establishing **strong** relationships with top tier educational institutions for a successful Ontario Aerospace Cluster



- The Centennial / Bombardier partnership can become a **World Leader** in Aerospace Skills Training
- Opportunity to create an aerospace collaborative research and development activity that leverages **Ontario's historic strengths** in aerospace and advanced manufacturing.
- A **strategic response** to an emerging trend for aerospace clusters being developed around the globe:
 - Brazil, Singapore, Florida, Georgia, India, Russia, China
- Opportunity for our leading educational institutions to work collaboratively in the development of **highly qualified people** for next generation aerospace employment.

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Bombardier Aerospace in Ontario

- Directly employs over **4,000*** people
- Generates over **9,000** direct, indirect and induced jobs, **\$60 million** in tax revenues and **\$2.7 billion** in economic output for Ontario annually
- Contributes to **five** successful aircraft programs, **90%** of which are **exported**
- Working with over **150** project-related **suppliers** in Ontario, generating over **\$540 million** in business
- **Downsview** centre of excellence is the **heart** of Ontario's burgeoning **aerospace cluster**

* Approximately 2,500 unionized employees

The Future Potential of Aerospace

- **Canada has the potential to double aerospace employment by 2020** (Deloitte: The Economic Impact of the Canadian Aerospace Industry)
- **Canada currently ranks 5th globally in aerospace**
- **Other regions have targeted aerospace as a highly desired national industry (India, China, Russia, Brazil) and have implemented sector innovation zones for aerospace.**
- **The global market for business aircraft is projected to be \$626 billion (24,000 units) between 2011 and 2030**
- **The global market for commercial aircraft in the segments where Bombardier competes is projected to be 17,400 units**

- The intention to initiate an Aerospace Review was first announced by the Federal Government in the 2011 Budget:
- “The Government will conduct—through a consultative process involving the Aerospace Industries Association of Canada and their member firms—a comprehensive review of all policies and programs related to the aerospace/space industry to develop a federal policy framework to maximize the competitiveness of this export-oriented sector and the resulting benefits to Canadians.” (Budget 2011, page 86)
 1. **Technology Development, Demonstration and Commercialization**
 2. **Space**
 3. **Market Access and Market Development**
 4. **Aerospace-Related Public Procurement**
 5. **Small Business and Supply Chain Development**
 6. **People and Skills**

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