

FUELLING INDUSTRIAL CLUSTERS AND REGIONAL GROWTH

FEI Canada Conference, Montréal 2009
May 29, 2009

BOMBARDIER

QUÉBEC'S AEROSPACE INDUSTRY

World's Largest Aerospace Locations

1. United States
2. United Kingdom
3. France
4. Germany
- 5. Québec**

QUÉBEC'S AEROSPACE JOBS

- 236 companies
- \$12.3 billion (2008 sales)
- 60% of Canada's total aerospace production
- 50% of Canada's aerospace jobs
- 42,000 people
- 70% of Canada's R&D expenditures



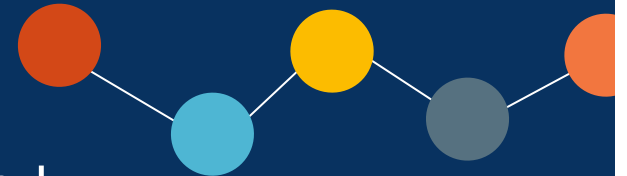
INDUSTRIAL CLUSTERS: ENGINES OF GROWTH

To promote

- Competitiveness
- Innovation
- Growth on local, regional and national scales

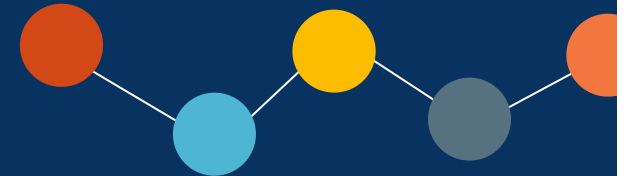
CATALYSTS FOR CLUSTER DEVELOPMENT

- **Industry innovation**
 - Bombardier develops the regional jet (1980s)
- **Government commitment**
 - Federal and provincial aerospace strategies
- **World-class aerospace companies**
 - Four prime contractors
 - 15 equipment integrators
 - A large network of subcontractors and suppliers



MONTRÉAL'S AEROSPACE CLUSTER

- World's second highest density of aerospace jobs
- Demonstrated leader in R&D



BOMBARDIER AEROSPACE

- 25 new aircraft programs since 1989
- 6,000 aircraft in service
- Every three seconds, a Bombardier aircraft takes off or lands somewhere around the world



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LEADING BY DESIGN



Learjet 85

BOMBARDIER

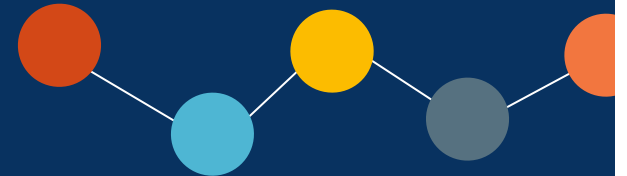
NOW IS THE FUTURE



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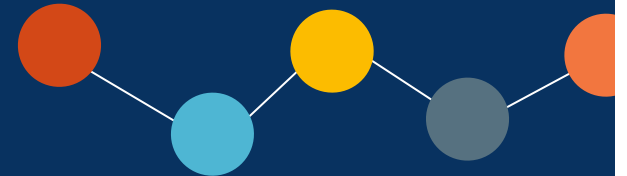
BOMBARDIER AEROSPACE IN MONTRÉAL

- **Five** main production and engineering facilities
- Nearly **14,000** employees
- A newly inaugurated Aerospace Product Development Centre



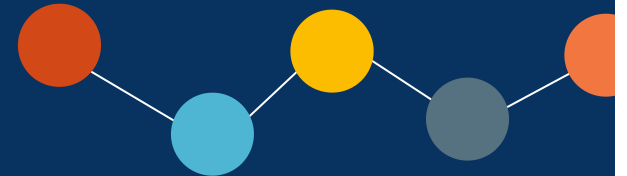
A TOPNOTCH ACADEMIC NETWORK...

- Funding university chairs
- Partnering with technical schools
- Developing aerospace-related programs



...AND INTERNATIONAL ORGANISATIONS

- Air Transport Association (IATA)
- International Aviation Business (IABC)
- International Civil Aviation Council (ICAO)



A GLOBAL INDUSTRY

Openness to global partnerships

- Northern Ireland
- Japan
- Taiwan
- China
- India



A STRONG EXTENDED SUPPLY CHAIN



*Global
Express*

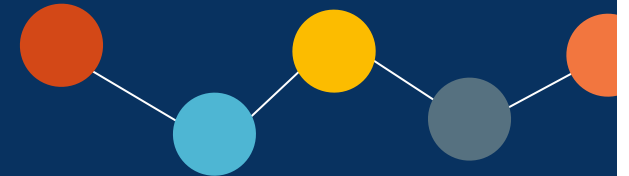
BOMBARDIER AEROSPACE IN MEXICO

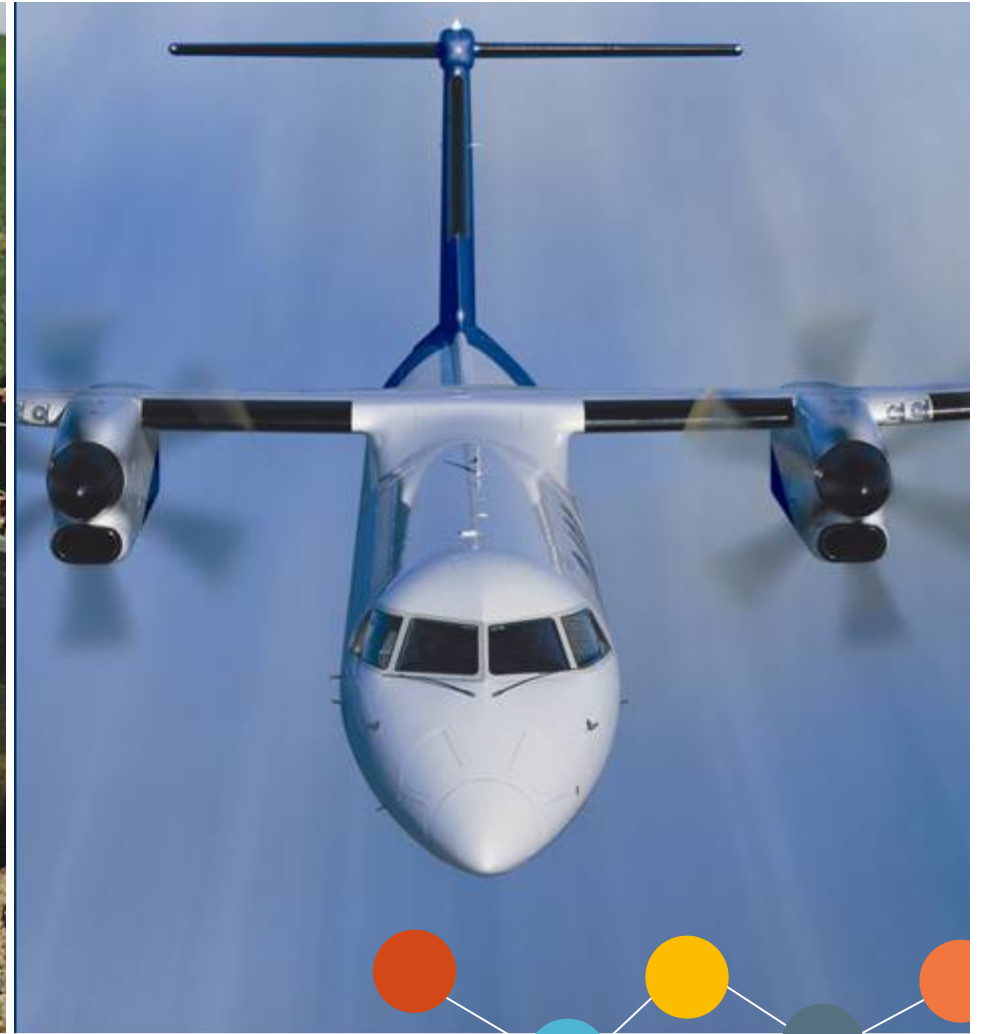
- Proximity to the U.S. market
- Government strategic priority
- Infrastructure
- Academic programs



HELPING CREATE CLUSTERS OF EXCELLENCE

- **Six** companies opened **nine** facilities
- **Six** more factories to open within next year
- Composite laboratory to open by end of 2009





BOMBARDIER
OUR WAY FORWARD

TO ACHIEVE OUR ASPIRATIONS

WE ESTABLISHED FIVE PRIORITIES

1

Become number one in customer satisfaction through enhanced execution discipline

2

Raise our game on global talent management

3

Actively manage our exposure to key business risks

4

Establish local roots in all our key markets

5

Enhance our corporate social responsibility

CRJ1000
NextGen





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