

# TAKING FLIGHT : CALGARY'S AEROSPACE SECTOR

## AEROSPACE SECTOR PROFILE





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Calgary Economic Development has compiled this sector profile to provide businesses and individuals with an overview of the aerospace industry and to identify emerging opportunities in the aerospace sector for the Calgary Region. Calgary's robust economy and its competitive business advantages have favourably positioned the aerospace sector for continued growth and diversification.

Over the last ten years, Alberta's share of the Canadian aerospace industry sector has more than doubled in size. Today, aerospace firms in the Calgary Region are primarily small to medium sized enterprises that inject over \$800 million dollars to the Calgary economy and provide direct employment for over 5,150 workers. Recognized as an emerging opportunity for business expansion and investment, the Calgary aerospace sector is anticipating further growth in three key sub-sectors:

- Maintenance Repair & Operations
- Defence Electronics
- Aerospace Information & Communication Technology

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# CALGARY ECONOMIC DEVELOPMENT

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Calgary Economic Development (CED) is Calgary's lead economic development agency committed to marketing the Calgary Region's competitive advantages, pro-business climate and superior lifestyle across Canada and around the world.

Our organization works closely with business, partner agencies, educational institutions, the community and all levels of government. We focus on leveraging Calgary's abundant energy and innovative spirit to sustain economic growth.

Calgary is Western Canada's business centre and has more head offices per capita than any other Canadian city. Its key economic drivers are Transportation and Logistics, Information and Communication Technology, Energy, Manufacturing, Financial and Business Services, Film and Creative Industries. CED concentrates its activities on developing these sectors; an experienced economic development professional is dedicated to each sector.

Using a hands-on approach, we are furthering the success and growth of existing businesses, helping small and medium businesses grow their markets globally, and promoting the Calgary Region as the ideal location for business investment. Our operating principles allow us to get the job done - by working with business and partners proactively, collaboratively and responsively.

Proud of its past and focused on tomorrow, Calgary is Canada's leading business opportunity centre. To make Calgary a part of your tomorrow, let us point you in the right direction.

**[www.calgaryeconomicdevelopment.com](http://www.calgaryeconomicdevelopment.com)**

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## OVERVIEW - AEROSPACE INDUSTRY

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Aerospace is a highly diverse industry sector, comprised of manufacturers and suppliers of civil, military, and business aircraft, helicopters, unmanned aerial vehicles, space systems, aircraft engines, missiles, material, and related components, equipment, services and information technology.

Canada is now among the world leaders in aerospace and defence production. Calgary continues to forge into this emerging industry and has established preeminent service delivery in the Maintenance Repair and Overhaul, Defence Electronics and Information Communication & Technology sub-sectors of the aerospace sector.

Calgary also boasts a number of unique assets that support the aerospace sector including Canada's premier aeronautics training facility at The Southern Alberta Institute of Technology (SAIT) Polytechnic. The Art Smith Aero Centre for Training and Technology, which opened in 2004, was built to meet the training requirements of the aerospace industry and clearly establishes Calgary as Canada's leader in innovative, customer-focused research and education within the aviation sector. The \$22 million facility features a hangar which is large enough to house a Next-Generation Boeing 737-700 aircraft, and also incorporates 13 instructional laboratories to support its unique aviation maintenance training programs including Aircraft Maintenance Engineers Technology (the only program of its kind in Alberta); Aircraft Structures Technician; and Avionics Technology.

# CALGARY'S AEROSPACE INDUSTRY SECTOR

A significant proportion of Alberta's aerospace industry activity is located in the Calgary region. As of 2005 there were 77 firms in Calgary's aerospace sector; employing approximately 5,150 skilled workers; creating nearly \$125 million in direct labour income; while generating over \$800 million in direct annual sales in the Calgary area.

## Aerospace Economic Impact in the Calgary Region

	FTEs	Labour Income	Revenue
Direct Impact - 2005	5,150	\$123.72 million	\$804.85 million
Total Impact - 2005	10,983	\$233.72 million	\$2.15 billion
<i>Source: Rick Erikson and Associates</i>			

Total revenues derived from aerospace sector activity in the Calgary region represent approximately three per cent of Canada's output and an employment level of approximately five per cent of the Canadian aerospace industry sector workforce. Opportunities to expand this market share in the Calgary Region are enhanced by the low business cost regime, specialized industry training programs and the inertia of the established aerospace industry.

While Calgary supports activities across the full aerospace sector, Calgary's strengths in aerospace are concentrated in three main sub-sector activities:

- Maintenance Repair and Overhaul (MRO)
- Defence Electronics
- Aerospace Information Communication & Technology

## Aerospace Industry Sub-Sectors in the Calgary Region

Sub-sector	Firms (#)	Portion of Sector (%)	Direct Employment (#)
Maintenance, Repair & Overhaul	32	42	950
Defence Electronics	9	12	1,200
Aerospace Information Communication & Technology	28	36	1,100
Other	8	10	1,900
Total	77	100	5,150
<i>Source: Rick Erikson and Associates</i>			

## Calgary Aerospace Industry Sub-Sectors

### Maintenance Repair and Overhaul (MRO)

Calgary has an international reputation for high quality Maintenance Repair and Overhaul (MRO) work at competitive prices. Calgary's MRO sub-sector is well established, and is primarily focused on regional, commuter and corporate aircraft work.

Companies in this group provide comprehensive maintenance, repair, overhaul and modification of: commercial passenger, cargo and corporate aircraft; avionics airframes; engines; equipment; component parts; as well as interior refurbishment and aircraft painting. In 2005, Calgary's well-established MRO Group represented:

- 32 firms
- Employing a skilled workforce of 950 people
- Generating in excess of \$220 million in annual revenue
- Sales split 45% domestic and 55% export

Key companies in the Calgary MRO sector include:

- Field Aviation
- Avmax
- Aero Aviation
- Eagle Helicopters

These firms specialize in providing 'one stop' MRO services. Calgary MRO facilities are able to accommodate regional to medium-sized commercial and corporate category aircraft, ranging in weight from 5,000 to 120,000 kg. Field Aviation is one of a select few MRO firms providing support to military customers and focuses primarily on the Canadian-built DeHavilland family of STOL aircraft.

The entrepreneurial nature of Calgary-based firms combined with a highly trained and skilled local workforce has resulted in a very competitive MRO sector. In addition, the presence of a strong supplier base and a reputation for quality work at competitive prices provides the Calgary MRO group with significant marketing advantages.

The benefits of the 'Alberta Advantage' and the above mentioned attributes place the Calgary MRO group at a competitive advantage over most G-8 countries, and in particular, the US. The primary customer base for Calgary MRO companies are Canadian and foreign regional air carriers as reflected in the 45/55 split of annual revenues between the domestic and export markets.

## Defence Electronics

Defence electronics supports Canadian and foreign military in the areas of secured communication, radar weapons systems, software, unmanned aircraft, simulation and imaging systems. Calgary's defence electronics sub-sector draws upon a highly educated and talented workforce, including Canada's largest per capita concentration of engineers and technologists.

The primary products and services offered by this group include: radar and avionics support; integrated communication systems; automated command and control systems; and, reconnaissance and surveillance systems. CDL Systems of Calgary is a key supplier of Vehicle Control Systems for remotely-controlled vehicles to the Canadian and US military. The customer base for this group is located in Canada, the US, the UK, Europe and the Pacific Rim.

As of 2005, Calgary's emerging Defence Electronics Group represented:

- 9 firms
- Employing 1,200 highly skilled engineers and technicians
- Generating annual revenues in excess of \$265 million
- Sales split 50% domestic and 50% export

Calgary's emerging Defence Electronics group is anchored by a number of multi-national Defence contractors, including:

- Raytheon Systems Canada
- General Dynamics Canada
- Harris Canada
- CDL Systems
- ATCO Frontec
- Instar Corporation
- Q-SINE Corp

Although this group is represented by a relatively small number of companies, the three largest: General Dynamics, Raytheon Canada and ATCO Frontec, collectively employ over 85 per cent of the group workforce and generate one third of all aerospace sales in the Calgary region.

These firms provide support to Canadian and foreign military establishments in the realm of:

- Tactical secured communication systems
- Software for radar-controlled weapon systems
- Aircraft avionics
- Aviation-borne surveillance systems
- Aviation systems integration
- Simulation and imaging systems
- Remote vehicle control technology

General Dynamics and Raytheon Systems Canada have recently secured major contracts with the Canadian and British militaries. General Dynamics has begun to update the Canadian Army's communications systems and has been awarded a major contract to undertake a similar project for the British Army. Raytheon continues to provide support to the Canadian Air Force fleet of CF-18 fighter aircraft, and also develops radar systems and provides Phalanx defensive system support for the Navy.

### **Aerospace Information Communication & Technology (AICT)**

Calgary is a growing and recognized centre for aerospace wireless technology, and for geo-spatial technology applications supporting aerospace activities, including GPS, geomatics and spatial imaging.

The AICT group forms a significant proportion of Calgary's aerospace sector. In 2005, Calgary's emerging AICT Group represented:

- 28 firms
- Employing 1,100 skilled workers
- Generating annual revenues in excess of \$355 million
- Sales split 45% domestic and 55% export

Key Calgary companies supporting aerospace activities include:

- CSI Wireless
- Intermap Technologies
- Novatel, Wi Lan Inc
- Northwest Geomatics
- Intergraph Canada

Much of the technology used by the AICT group of companies involves Global Positioning and/or wireless communications related to navigation and tracking systems. These applications include navigational and control systems for unmanned aerial and land vehicles. This technology is also used to transfer real time data on the in-flight operating parameters of commercial aircraft from any part of the globe. The group has extensive capability in the following areas:

- Wireless communications
- GPS technology
- Remote sensing
- Hyper – spectral and spatial imaging
- Mobile data acquisition and sensor technology

## **Aerospace Industry Outlook**

Some opportunities on the horizon to expand Calgary's aerospace industry include:

- Unmanned vehicle system (UVS) technology research which is underway for application in the oil and gas industry to detect pipeline gas leaks;
- University of Calgary researchers are also using robotic technology to conduct internal and external pipeline operations, which, if successful, may lead to the implementation of aerospace technologies in the multi-billion dollar oil sands projects in northern Alberta;
- Potential benefits to the Calgary aerospace industry due to its proximity to the Suffield and Cold Lake military bases and related defence technology testing.

The Calgary Region has taken a pro-active approach to support the growth and diversification of the aerospace industry with a commitment to excellence that has produced a strong competitive business environment offering:

- World class educational facilities with exceptional R&D capabilities;
- A well trained workforce augmented by a strong educational infrastructure;

- World class transportation and logistics infrastructure, offering a full range of intermodal services and solutions;
- An abundance of expertise and specialized talent in advanced and emerging technologies;
- Excellent cross-over technology and creative synergy with other local leading edge technical sectors such as oil & gas, UVS and telecommunications;
- Strong local and provincial economy;
- Excellent local SME supplier/support base;
- Low business taxes.

Industry experts face the compelling fact that 40 to 60 per cent of the current aerospace maintenance personnel are expected to retire by 2016. Accordingly, the Art Smith Aero Centre for Training and Technology, completed in 2004, was expressly designed and built to proactively meet the future training requirements for the aerospace industry.

Other dynamic factors influencing the future outlook of Calgary's three core aerospace service functions include:

### **Maintenance, Repair & Overhaul (MRO)**

The MRO sector envisions a moderate increase in the regional aircraft repair and overhaul sector with potential to provide heavy maintenance to mainline carriers such as WestJet who currently is contracted with a firm in Quebec. MRO growth is contingent upon successfully meeting the challenge of: recruiting, training and retaining a sufficient number of aircraft maintenance engineers and technicians. Construction of additional hangar facilities in the Calgary area would also contribute to future growth and diversification.

### **Defence Electronics**

With international sales contributing more than 50% of the sector's revenues, it is clear that the international market will continue to drive Canada's aerospace industries. The U.S. will continue to be our largest export market in both the defence and civilian sectors. Emerging opportunities will evolve in homeland security and defence contracting with the increase of Canada's military capital commitments and with the U.S. defence requirement.

### **Aerospace Information & Communications Technology**

In both the defence electronics and AICT groups, escalating defence spending and elevated priorities involving security issues in Canada, U.S. and abroad, present significant opportunity in a variety of technological areas and in particular the unmanned vehicle systems sector (UVS). As the Maritime Helicopter Program matures, some companies in this sector see an opportunity to provide "life cycle" support in the form of aircraft electronics/ avionics systems repair.

# CALGARY AEROSPACE ADVANTAGES

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Calgary offers significant competitive advantages relative to other western North American cities including sophisticated transportation and logistics services that facilitate access to major global markets, and a thriving business climate that features a favourable tax regime.



## A Proven Location

Calgary's location, and its highly integrated transportation and logistics system, has earned international acclaim for its efficient distribution of goods from Calgary to destinations throughout Canada, the United States and the rest of the world. Calgary provides ready access to the United States - the world's largest industrial and consumer market - by road, rail and air. Calgary also provides access to the rapidly expanding markets in Asia by air and via the Port of Vancouver, and is also regarded by many European companies as a gateway to North America.

The significant military presence in Alberta - and particularly the close proximity of Canadian Forces Base Cold Lake - is advantageous to Calgary's air support industry. The base has a well-developed test range and is the location of the Aerospace Engineering Test Establishment (AETE). The purpose of the AETE is to evaluate the airworthiness and operational effectiveness of aerospace systems. These facilities draw international awareness to the region and can be adapted for civilian use.

## Transportation Infrastructure

Calgary maintains its sophisticated access and connection to major markets in North America and around the world through its world-class transportation and logistics system that delivers a full range of multimode services, solutions and features:

Logistics, supply chain management (SCM) and transportation system management services, including:

- Brokerage and freight forwarding services
- Product distribution via air, rail, truck
- Intermodal shipping solutions and logistics
- Just-in-time inventory planning.

Linked road, rail and air networks and carriers, including:

- Canamex and Trans-Canada Highways
- CN and CP rail hubs
- 30 international air carriers including Air Canada and WestJet.

Accessible terminals, warehousing and distribution centres, including:

- Calgary International Airport
- Springbank Airport
- Vancouver – Calgary's port.

The Calgary International Airport's passenger facilities are considered to be the best in the world. In 2004, J.D. Power and Associates ranked Calgary's airport number one in passenger satisfaction for airports with less than 10 million passengers per year in its Global Airport Satisfaction Index Study. Spacious, modern and friendly, Calgary's airport has non-stop flights to 49 cities around the world and is Canada's fourth busiest airport. It serves more than 9.1 million passengers a year (5.8 million domestic passengers, 1.6 million trans-border passengers and 600,000 international passengers).

Operated and maintained by the Calgary Airport Authority, the Springbank Airport is a Canada Customs-designated airport of entry located 10 kilometres west of Calgary just off the TransCanada Highway in the Municipal District of Rocky View No. 44. It occupies about 420 hectares (1,040 acres) and is the gateway to the Canadian Rockies and conveniently close to the towns of Cochrane and Bragg Creek.

## **Driving and Flight Times**

Calgary provides ready access to Asia, Europe, and, of course, the United States; many American cities are less than a four-hour flight from Calgary.

## Driving and Flight Times

Driving and Direct Flight times from Calgary		
Canada	Drive	Flight
Edmonton	3 h	45 m
Montreal	38 h	4 h
Ottawa	36 h	3 h 50 m
Regina	8 h	1 h 11 m
Thunder Bay	21 h	2 h 50 m
Toronto	35 h	4 h 10 m
Vancouver	11 h	1 h 15 m
Winnipeg	14 h	2 h 10 m
United States		
Chicago	26 h	3 h 30 m
Dallas	32 h	3 h 40 m
Denver	14.5 h	2 h 23 m
Los Angeles	27 h	3 h
New York City	40 h	5 h 53 m
Salt Lake City	15 h	1 h 46 m
San Francisco	22 h	2 h 44 m
Seattle	12 h	1 h 10 m

*Source: StatisticsCanada, U.S. Census Bureau, The Calgary Advantage, ProximityOne, GGA Management Consultants*

## Tax Advantages

### Low Taxes

Calgary benefits from a low tax regime: the province of Alberta has no municipal or provincial sales tax and has one of the lowest provincial corporate tax rates in Canada (10 per cent). Furthermore, the Canadian corporate tax rate is declining to 21 per cent (as outlined in the 2004 federal budget), lower than most U.S. jurisdictions, and there is no provincial general capital tax. Calgary businesses also benefit from the fact that Alberta has no inventory tax, no machinery and equipment tax and no payroll tax.

Alberta is the only Canadian province to have a flat income tax rate (10 per cent). All other Canadian provinces work on a sliding income scale. In addition, the provincial government is debt-free; Calgary's low tax regime is expected to continue. Alberta's beneficial tax regime creates an environment in which businesses can operate more profitably, and individuals can retain more of their personal incomes.

Effective April 2006, the provincial government dropped the general corporate income tax rate to 10 per cent from 11.5 per cent. Alberta's small business rate is three per cent.

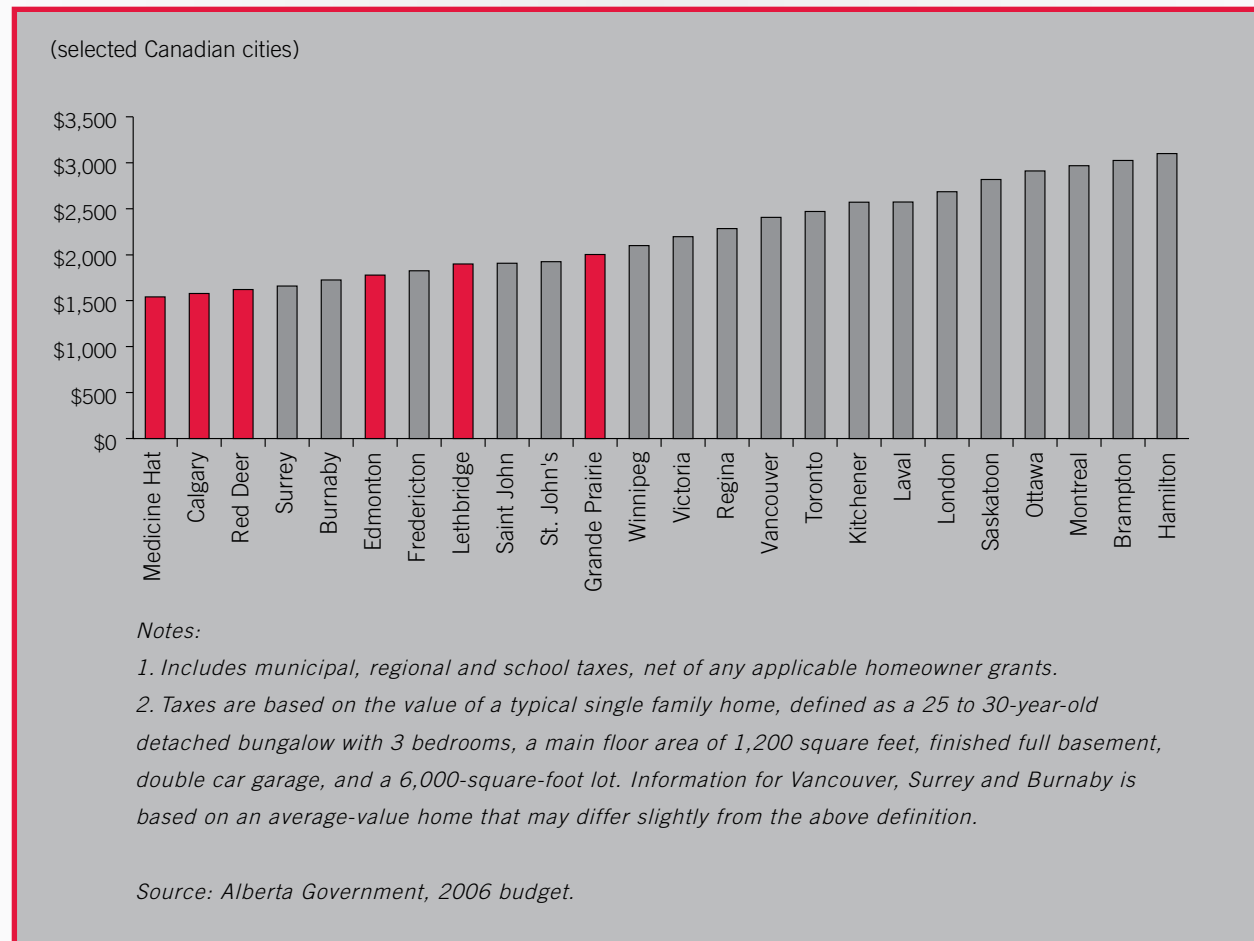
Since 2001, the provincial government has cut the small business rate in half and doubled the small business income threshold to \$400,000. As well, the general corporate tax rate decreased by 25 per cent and the government has pledged to further reduce the general rate to eight per cent.

### Corporate Tax

Effective April 2006, the provincial government dropped the general corporate income tax rate to 10 per cent from 11.5 per cent and Alberta's small business rate is three per cent.

Since 2001, the provincial government has cut the small business rate in half and doubled the small business income threshold to \$400,000 and the general corporate tax rate decreased by 25 per cent. The government has pledged to further reduce the general rate to eight per cent.

### Net Property Tax for a Single-Family Home, 2005



## Major Provincial Tax Rates, 2006

	AB	BC	SK	MB	ON	QC	NB	NS	PE	NL
<b>Personal income tax</b>										
Statutory rate range										
– lowest rate (%)	10.00	6.05	11.00	10.90	6.05	16.00 <sup>a</sup>	9.68	8.79	9.80	10.57
– highest rate (%)	10.00	14.70	15.00	17.40	11.16	24.00 <sup>a</sup>	17.84	17.50	16.70	18.02
Surtax (%)	–	–	–	–	20.0/36.0	–	–	10.0	10.0	9.0
<b>Credit amounts</b>										
Basic amount (\$)	14,899	8,858	8,589	7,734	8,377	6,520	8,061	7,231	7,412	7,410
Spousal amount (\$)	14,899	7,585	8,589	6,482	7,113	6,520	6,845	6,140	6,294	6,055
<b>Corporate income tax</b>										
General rate (%)	10.0	12.0	17.0	14.5	14.0	9.9	13.0	16.0	16.0	14.0
M&P rate (%)	10.0	12.0	10-17 <sup>b</sup>	14.5	12.0	9.9	13.0	16.0	16.0	5.0
Small business										
– rate (%)	3.0	4.5	5.0	4.5	5.5	8.5	2.0	5.0	6.5	5.0
– threshold (\$000)	400	400	300	400	400	400	450	350	300	300
<b>Capital tax</b>										
General (max. %)	–	–	0.60	0.50	0.30	0.525	0.25	0.275	–	–
Financial										
institutions (max %)	–	3.00	3.25	3.00	0.90	1.30 <sup>c</sup>	3.00	4.00	5.00	4.00
<b>Retail sales tax (%)</b>	–	7.0	7.0	7.0	8.0	7.5 <sup>d</sup>	8.0	8.0	10.0 <sup>d</sup>	8.0
<b>Gasoline tax (¢/litre)</b>	9.0	14.5 <sup>e</sup>	15.0	11.50	14.7	15.2 <sup>ef</sup>	14.5 <sup>f</sup>	15.5 <sup>f</sup>	20.7	16.5 <sup>f</sup>
<b>Tobacco tax (\$/carton)</b>	32.00	35.80	35.00 <sup>f</sup>	35.00 <sup>f</sup>	24.70	20.60	23.50 <sup>f</sup>	31.04 <sup>f</sup>	34.90 <sup>g</sup>	34.00 <sup>f</sup>
<b>Payroll tax (max. %)</b>	–	–	–	2.15	1.95	4.26 <sup>g</sup>	–	–	–	2.00

Rates for other provinces as of March 21, 2006.

a Quebec residents receive an abatement of 16.5% of basic federal tax in lieu of federal cash transfers to Quebec for several social programs.

b The general rate is reduced by up to 7 points based on the share of a corporation's national manufacturing and processing income allocated to Saskatchewan.

c The Quebec financial institutions capital tax includes a base rate of 1.20% and a compensatory tax of 0.25%.

d These provinces apply their retail sales tax on the retail price of the good inclusive of the GST.

e An additional 6¢/litre is imposed in the greater Vancouver area. 2.5¢/litre in Victoria and 1.5¢/litre in Montreal.

f These provinces apply their retail sales taxes on the retail price of the good inclusive of the particular excise tax.

g Quebec levies an additional 2% compensatory tax on the wages paid by financial institutions that is not included in this rate.

Source: Alberta Government, 2005 Budget

## Provincial Income Tax Rates, 2006

(%)	AB	BC	SK	MB	ON	QC	NB	NS	PE	NL	Canada
General	10.0	12.0	17.0	14.5	14.0	9.9	13.0	16.0	16.0	14.0	22.12
Mfg. & processing	10.0	12.0	10-17	14.5	12.0	9.9	13.0	16.0	16.0	5.0	22.12
Small business	3.0	4.5	5.0	4.5	5.5	8.5	2.0	5.0	6.5	6.5	13.12

*Source: Alberta Economic Development*

## Top Marginal Personal Income Tax Rates, 2006

(%)	AB	BC	SK	MB	ON	QC	NB	NS	PE	NL
Federal	29.00	29.00	29.00	29.00	29.00	29.00	29.00	29.00	29.00	29.00
Provincial	10.00	14.70	15.00	17.40	17.41	24.00	17.84	19.25	18.37	19.64
Federal abatement <sup>1</sup>	–	–	–	–	–	(4.79)	–	–	–	–
<b>Total</b>	<b>39.00</b>	<b>43.70</b>	<b>44.00</b>	<b>46.40</b>	<b>46.41</b>	<b>48.21</b>	<b>46.84</b>	<b>48.25</b>	<b>47.37</b>	<b>48.64</b>

*Rates for other provinces known as of March 21, 2005.*

*1 Quebec residents receive an abatement of 16.5% of basic federal tax in lieu of federal cash transfers to Quebec for several social programs. This reduces the top federal rate of 29% by 16.5% or 4.79% of taxable income.*

*Source: Alberta Government, 2006 Budget*

## Fuel Taxes

Alberta has the lowest fuel tax rate of Canada's central and western provinces: 3.4 cents per litre less than the national average.

## Fuel Tax Comparison

Fuel Tax Rates (cents per litre)	Alberta	Manitoba	British Columbia	Ontario	Saskatchewan
Gasoline (regular)	9	11.5	14.5	14.7	15
Diesel	9	11.5	15	14.3	15

*Source: Gas Tax Honesty Campaign – Canadian Taxpayers Federation, M.J. Ervin and Associates, May 2005*

## Labour Costs

Calgary's labour costs are competitive with other western Canadian cities and are lower than comparable U.S. jurisdictions, offering employers a significant competitive advantage.

Calgary's labour costs are also lower than the provincial average and contribute to its low business cost index.

### Alberta Labour Costs At a Glance, 2005

<b>Mandatory</b>	
<i>Employer paid benefits</i>	
Canadian Pension Plan	4.95% <sup>1</sup>
Worker's Compensation	\$1.83 per \$100 of insurable earnings (1.83%) is the average for 2005. The rate for the insurance industry is \$0.39
Employment insurance	2.73% <sup>2</sup>
Paid vacation	4.0% (6% after four years) <sup>3</sup>
Holidays	Alberta employees are entitled to nine paid general holidays
<b>Voluntary</b>	
<i>Health care premiums</i>	
Single	\$44/month <sup>4</sup>
Family	\$88/month <sup>5</sup>
<b>Other</b>	
Minimum wage	\$7.00 <sup>6</sup>
<p><i>Notes:</i></p> <p>1. Determined by federal law. Maximum contribution is \$1,861.20 (2005). Calculation is based on maximum pensionable earnings of \$41,100 minus a basic deduction of \$3,500 times 4.95%.</p> <p>2. Maximum contribution of \$1,064.70 is achieved at an annual salary of \$39,000.</p> <p>3. If employees are paid a monthly salary, they receive their regular rate of pay for the time of their vacation. All other employees receive vacation pay as a percentage of wages for the year for which vacation was given. All construction employees receive 6% (no qualifying period necessary).</p> <p>4. Assumes that adjusted taxable income exceeds \$15,970; otherwise a lower rate applies.</p> <p>5. Assumes that adjusted taxable income exceeds \$34,250; otherwise a lower rate applies.</p> <p>6. As of September 1, 2005.</p> <p>Source: Alberta Economic Development, 2005</p>	

## Labour Costs Index

Index of Labour Costs, Average of 12 Industry Operations, 2003	
Calgary	100
Vancouver	104
Toronto	105
Colorado Springs	114
Minneapolis	117
Chicago	121
Seattle	122

*Source: KPMG CEO's Guide to International Business Costs, February 2006*

## Unionization Rates

Alberta's unionization rate is among the lowest in Canada. Private sector unionization is 12.4 per cent; overall unionization is 23.7 per cent, with the bulk of unionized workers employed in public administration, education and health.

Over the past 10 years, Alberta's person-days lost due to labour disputes have ranked among the lowest in Canada.

## Provincial, National Unionization Rates

Region	Total %
Canada	31.8
Quebec	40.0
Newfoundland	38.9
Manitoba	37.5
Saskatchewan	35.3
British Columbia	33.6
Prince Edward Island	32.3
Nova Scotia	28.7
New Brunswick	28.5
Ontario	27.8
<b>Alberta</b>	<b>23.7</b>

*Source: Statistics Canada, Labour Force Historical Review, 2004*



## Stellar Economic Performance

Calgary is Canada's fastest-growing economic region, with an estimated 4.6 per cent growth in real GDP in 2005. It also has had the highest growth in employment of any major Canadian city, at 40.7 per cent from 1995 to 2004.

Also, from 2000 to 2004, Calgary had the highest-average annual population growth of any major Canadian city – at 2.3 per cent. Calgary was a migrant workforce magnet between 1995 and 2004, with inter-provincial migration about 6,900 workers annually. Due to this strong growth, the Calgary region's population has topped one million.

## Benefits to Businesses and Employees Business Cost Index

Calgary has a very low, cost-effective business cost index, especially when compared to other North American centres.

### Business Cost Index

<b>Calgary, AB</b>	<b>94.7</b>
Toronto, ON	96.5
Oklahoma	97.8
Salt Lake City	99.6
Colorado	100.8
Dallas	101.2
Houston	102.9
<i>Source: KPMG CEO's Guide to International Business Costs, February 2006</i>	

## Crime Rate Index

One of the safest cities in North America, Calgary has a low crime rate which translates into fewer property losses and lower insurance costs for businesses and individuals.

## Crime Rate Index

<b>Crime Rate Index, Selected North American Cities</b>	
<b>City</b>	<b>Crime Rate Index</b>
Chicago	374
Los Angeles	283
Vancouver	239
Edmonton	200
Denver	172
Seattle	149
<b>Calgary</b>	<b>117</b>

*Source: The Relocation Crime Lab – National Association of Realtors, www.homefair.com, 2001*

# FINANCING AND GOVERNMENT PROGRAMS

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## Technology Partnerships Canada (TPC)

This federal program is sponsored by Industry Canada and is designed to provide financial assistance to aerospace companies advancing a new product or technology to the marketplace. The product or technology must be downstream of the R&D phase. Funding assistance is equivalent to one third of the production and marketing costs and is repayable once the company shows a return of the product or technology.

Prime benefactors of the TPC program have been companies such as Bombardier Aerospace and Pratt & Whitney Canada in the development of regional jet aircraft and turbine jet aircraft. Several aerospace SMEs have also taken advantage of the program in Alberta.

### TPC - Alberta & Northwest Territories

Canada Place  
9700 Jasper Avenue, Suite 725  
Edmonton, Alberta T5J 4C3  
Tel: (780) 495-2943  
Fax: (780) 495-4507  
[www.tpc-ptc.ic.gc.ca](http://www.tpc-ptc.ic.gc.ca)

## Industrial Research Assistance Program (IRAP)

This federal program is sponsored by Industry Canada and offers grant assistance of up to \$350 thousand to aerospace companies for the development of unique technologies and provides repayable loan assistance of up to \$3 million for commercialization purposes. The program requires that the loan applicants contribute 50 per cent of the total costs involved in the commercialization project. The loans are underwritten by Technology Partnerships Canada and are targeted at SMEs.

IRAP also offers salary subsidies to companies hiring new post secondary graduates.

### National Research Council

Industrial Research Assistance Program  
250 Karl Clark Rd  
Edmonton, Alberta T6N 1E4  
Telephone: (780) 495-6509  
Facsimile: (780) 495-6510  
[www.irap-pari.nrc-cnrc.gc.ca](http://www.irap-pari.nrc-cnrc.gc.ca)



### **Unleashing Innovation Funding Program (Innovation & Science)**

Provincial Research & Development grant assistance is available to private sector companies for development of new technologies. To qualify for grant assistance, companies must be sponsored by a provincial government department and the need for technology must be compatible with the department's objectives, business plans, etc. This program has been used for development of emerging unmanned vehicle system technology in the agricultural field.

#### **Alberta Innovation and Science**

9th Floor, 10365 97 Street

Edmonton, Alberta T5J 3W7

Phone: (780) 427-0285

Fax: (780) 415-9824

Email: [is.inq@gov.ab.ca](mailto:is.inq@gov.ab.ca)

[www.innovation.gov.ab.ca](http://www.innovation.gov.ab.ca)

# EDUCATION AND TRAINING PROGRAMS

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## University of Calgary

The University of Calgary is a comprehensive research university that provides a dynamic setting for scholars in 16 faculties, 53 departments and more than 30 research institutes and centres. The U of C has more than 4,700 faculty and staff and nearly 29,000 full-time equivalent students, including 900 international students from 87 countries. In 2004, the U of C granted 6,415 degrees.

U of C programs that are of considerable value to Calgary's aerospace sector include bachelor and graduate degree programs in:

- Electrical Engineering
- Computer Engineering, Information & Software Systems
- Geomatics Engineering
- Business Information Systems
- Information Technology Systems

Graduates from these programs are readily absorbed into Calgary's Defence Electronics and Information Communications and Technology sub-groups alongside the UVS sector.

## University of Calgary

2500 University Drive N.W.

Calgary, Alberta, Canada T2N 1N4

Phone: (403) 220-5110

[www.ucalgary.ca](http://www.ucalgary.ca)

## Southern Alberta Institute of Technology (SAIT) Polytechnic

The Southern Alberta Institute of Technology (SAIT) Polytechnic offers more than 70 applied degree, diploma and certificate programs to some 65,000 students every year. SAIT Polytechnic is internationally renowned for its quality technical education and hands-on training.

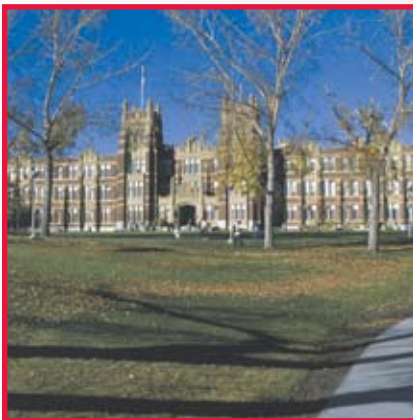
SAIT has had a long-standing reputation for offering one of the most comprehensive and enduring aircraft maintenance engineering programs in Canada and offers two-year diploma programs in:

- Aircraft Maintenance Engineers Technology
- Aircraft Structures Technician
- Avionics Technology

In the fall of 2004, the Art Smith Aero Center for Training & Technology was opened at the Calgary International Airport. This new 21,000 sq. ft 'state of the art' facility can accommodate a Boeing 737-700 in its adjacent hangar and the facility houses 13 instructional laboratories and all SAIT aviation programs, which include:

- Sheet Metal
- Composite materials
- Gas turbine
- Avionics
- Helicopter
- Reciprocating engine
- Aircraft Maintenance and computers

SAIT Polytechnic also provides customized training to meet the needs of specific customers such as MRO firms, aerospace manufacturers, air carriers and the like. Total annual enrollment in all programs is approximately 230 students with approximately 100 graduating each year. Current industry demand results in virtually a 100 per cent placement for graduating classes.

**SAIT Polytechnic**

1301 - 16 Avenue N.W.

Calgary, Alberta T2M 0L4

Phone: (403) 284-SAIT (7248)

Toll free: 1-877-284-SAIT(7248)

Email: [advising@sait.ca](mailto:advising@sait.ca)

[www.sait.ab.ca](http://www.sait.ab.ca)

## Mount Royal College

Mount Royal College was founded in 1910 to help students achieve their full potential. Today, about 13,000 students from Canada and around the globe work toward this goal every year. Mount Royal College offers more than 60 degree, diploma, university transfer and certificate programs in areas such as arts, business, communications, health and community studies and science and technology. International exchange agreements with leading educational institutions in the United States, Mexico and Asia provide global learning opportunities. Mount Royal College graduated 1933 students in 2002-2003.

Mount Royal College provides commercial pilot training diplomas and applied computer degree programs. The college also offers a two-year diploma in Aviation Program leading to a commercial air license with parallel training in business administration, human factors and aviation management practices. Flight training is conducted at a 25,000 sq ft facility located on the Springbank Airport; the College operates 10 training aircraft. The program places approximately 25 entrants each year in the program.

The College also offers an Applied Computer Information Systems & Business degree. This four-year Baccalaureate program is a joint venture between MRC's Business and Science Schools to produce technically competent people with a strong sense of entrepreneurship. The program provides space for 90 new entrants per year.

### Mount Royal College

4825 Richard Road S.W.  
Calgary, Alberta T3E 6K6  
Phone: (403) 440-6611  
[www.mtroyal.ca](http://www.mtroyal.ca)

## DeVry

DeVry Institute of Technology offers bachelor's degree and diploma programs that combine today's business skills with current technical applications. DeVry Calgary is the largest DeVry institution in Canada and had 500 graduating students in 2002-2003. DeVry offers the following bachelor degree technology programs that may support aerospace:

- Electronics Engineering Technology
- Computer Engineering Technology
- Computer Information Systems
- Business Information Systems
- Information Technology



Graduates from these programs are readily absorbed into Calgary's Defence Electronics and Information Communications and Technology sub-groups alongside the UVS sector. DeVry is also a member of the AUVS program with AUVS USA providing additional applied training and opportunities for students in the design, test and deployment of robotic drones for aerial, underwater and ground vehicles. Enrollment is 1,000 students per year and approximately 300 graduates in the engineering technologies program.

**DeVry Institute of Technology Calgary**

2700 - 3 Avenue S.E.

Calgary, Alberta T2A 7W4

Phone: (403) 235-3450

Toll free: (800) 363-5558

[www.devry.ca](http://www.devry.ca)

# INDUSTRY ASSOCIATIONS & RESEARCH INSTITUTIONS

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## Aviation Alberta

Aviation Alberta was established to be a catalyst for industry growth and the recognized voice of aerospace, airport and aviation interests in Alberta. Through the Aerospace Group, Aviation Alberta actively promotes enhancing the existing aerospace base through export market intelligence, facilitating business networks and working with all levels of government in the promotion of domestic and international investment in aerospace.

### Aviation Alberta

2000 Airport Road N.E.  
Calgary, Alberta T2E 6W5  
Phone: (403) 717-2289  
Fax: (403) 735-1281  
Email: [dmathews@yyc.com](mailto:dmathews@yyc.com)  
[www.aviationalberta.com](http://www.aviationalberta.com)

## Aerospace Industries Association of Canada (AIAC)

AIAC is a member-driven, not-for-profit national trade association that promotes and facilitates Canadian competitiveness in the global market for aerospace goods and services. It is the collective voice of Canada's leading aerospace manufacturers and service providers – an effective advocate on a broad range of public policy issues that have a direct impact on aerospace companies in Canada. Through its network of member companies, its productive relationships with federal government departments and agencies, and its globe-spanning international contacts, AIAC responds quickly and effectively to capitalize on sector opportunities and to combat threats to sector competitiveness.

### Aerospace Industries Association of Canada

60 Queen Street  
Suite 1200  
Ottawa, Ontario K1P 5Y7  
Phone: (613) 232-4297  
Fax: (613) 232-1142  
Email: [info@aiac.ca](mailto:info@aiac.ca)  
[www.aiac.ca](http://www.aiac.ca)

## **Western Aircraft Maintenance Engineers Association (WAMEA)**

WAMEA is one of six similar associations across Canada that represents regional interests as well as concerns of national importance to maintain and enhance the standards of professionalism of aircraft maintenance engineers and the aircraft maintenance industry as a whole. The association works with and is consulted by Transport Canada in the formulation of new rules and regulations to promote the viewpoint of the WAMEA and is represented on various committees and working groups involved with aircraft maintenance and licensing. The Canadian Federation of Aircraft Maintenance Engineers Associations, (CFAMEA), is a national body which is supported and financed by all the regional associations and which represents the associations at the national level.

### **Western AME Association**

Box 16, 575 Palmer Road N.E.  
Calgary, Alberta T2E 7G4  
Phone: (403) 284-7018  
Fax: (403) 284-7226  
[www.wamea.com](http://www.wamea.com)

## **Armed Forces Communications & Electronics Association (AFCEA)**

AFCEA Canada strives to be a world-class association dedicated to serving the communications, electronics and information systems community. They are committed to excellence, the highest ethical standards, and professional enrichment of its members in all of our activities. AFCEA was incorporated in 1986 as a component of AFCEA International and has a National Headquarters in Ottawa with a Council of Advisors (Board of Directors) drawn from across Canada to guide its activities.

AFCEA Canada pursues its objective by providing a forum for the exchange of ideas and information among its members and a bridge between industry and government in the specialty fields of communications, electronics, command and control, intelligence and information systems.

### **AFCEA Canada Administration**

309 Amiens Street  
Orleans, Ontario K1E 1N3  
Phone: (613) 837-4602  
[www.afcea.ca](http://www.afcea.ca)

## **Canadian Defence Industries Association (CDIA)**

CDIA is a non-profit organization of Canadian companies that have a common interest in selling products and services to the Department of National Defence or foreign defence departments and in supporting the defence industry as an important pillar in building and maintaining a modern and effective Canadian defence capability suitable for the times. CDIA currently represents approximately 400 member companies.

### **Canadian Defence Industries Association**

Tel: (613) 235-5337

Fax: (613) 235-0784

Email: [cdia@cdia.ca](mailto:cdia@cdia.ca)

[www.cdia.ca](http://www.cdia.ca)

## **Alberta Research Council (ARC)**

ARC develops and commercializes technology to give its customers a competitive advantage. A Canadian leader in innovation, ARC provides solutions globally to the energy, life sciences, agriculture, environment, forestry and manufacturing sectors. ARC undertakes applied research and development for energy companies on a contract basis. ARC can also co-venture to develop new technologies, earning a return on investment from the commercialization of products and processes. ARC provides access to world-class resources at facilities in western Canada, and a team drawn from 600 experienced scientists, researchers and business experts.

As Canada's largest provincial research organization, ARC works with customers and partners to bring technology developments into commercial use. Its applied research and development work in advanced materials has been of particular benefit to clients in the aerospace industry.

### **Alberta Research Council**

3608 - 33 St. N.W.

Calgary, Alberta T2L 2A6

Phone: (403) 210-5222

Fax: (403) 210-5380

[www.arc.ab.ca](http://www.arc.ab.ca)

## SUPPORT ORGANIZATIONS

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### **Calgary Technologies Inc. (CTI)**

CTI's business is in the economic development of Calgary's advanced technology sector. Established in 1981, Calgary Technologies Inc. is a joint partnership with The City of Calgary, the Calgary Chamber of Commerce and the University of Calgary. Together, these organizations work with companies and entrepreneurs to develop and expand technology and life sciences in Calgary.

CTI provides an array of unique programs and services for technology commercialization and incubation, including networking. ConnectCalgary is one of the major projects overseen and managed by CTI.

#### **Calgary Technologies Inc.**

3553 - 31st Street N.W.

Calgary, Alberta T2L 2K7

Phone: (403) 284-6400

Fax: (403) 282-1238

Email: [technology@calgarytechnologies.com](mailto:technology@calgarytechnologies.com)

[www.calgarytechnologies.com](http://www.calgarytechnologies.com)

### **Calgary Regional Partnership**

A number of diverse municipalities and jurisdictions, each with a unique identity, have joined the Calgary Regional Partnership to work cooperatively on issues related to delivering municipal services to residents and businesses, enhancing regional prosperity and protecting the natural environments upon which their citizens depend.

#### **Calgary Regional Partnership**

Box 2093

Cochrane, Alberta T4C 1B8

Phone: (403) 863-7425

[www.calgaryregion.ca](http://www.calgaryregion.ca)

## **Calgary Business Information Centre (CBIC)**

CBIC is a first-stop resource, established to provide individuals with free or affordable access to useful and authoritative information for launching a business in the Calgary region. CBIC is a not-for-profit organization funded by all three levels of government and a member of the Canada Business Service Network. Together, CBIC and the Business Link - Business Service Centre promote the development and success of small business.

### **Calgary Business Information Centre**

250, 639 5th Avenue S.W.

Calgary, Alberta T2P 0M9

Phone: (403) 221-7800

Fax: (403) 221-7817

Email: [cbic@ic.gc.ca](mailto:cbic@ic.gc.ca)

[www.calgary-smallbusiness.com](http://www.calgary-smallbusiness.com)

## EXCEPTIONAL QUALITY OF LIFE



### Health

Calgarians value the quality of their public health-care system and are committed to continuously improving its services and program. For example, a new Alberta Children's Hospital is under construction on the University of Calgary's West Campus by the Calgary Health Region. This world-class pediatric health-care facility will be completed in 2006. It will feature state-of-the-art technology and family-centred care, research and education – to the benefit of all Calgarians.

The vast majority of the Calgary area's health services are delivered by 2,000 physicians (family practitioners and specialists) and the Calgary Health Region. Funded by the Province of Alberta, the Calgary Health Region employs 22,000 people and each year delivers more than \$1.5 billion in health-care services at more than 100 locations, including four hospitals in Calgary (the Foothills Medical Centre, Rockyview General Hospital, Peter Lougheed Centre, and Alberta Children's Hospital) and more than a dozen hospitals and health care centres in the surrounding communities of Canmore, Banff, Claresholm, Didsbury, High River, Black Diamond, Strathmore and Vulcan. In all, the Region serves more than 1.1 million people in southern Alberta, southeastern British Columbia and southwestern Saskatchewan.

An integral part of Calgary's health-care system is the University of Calgary, where the faculties of Medicine, Nursing and Kinesiology educate new generations of health-care practitioners and conduct world-renowned research.

Calgary was ranked as the Healthiest City in the World to live in in a survey by Mercer Human Resource Consulting in 2004. The survey examined 144 cities.

### Education

In addition to the post-secondary institutions highlighted previously, Calgary's education system includes: the Calgary Board of Education, which has 215 public schools with more than 9,000 teaching staff and nearly 100,000 students. Also, the city has 96 Catholic schools with more than 4,000 staff and nearly 44,000 students. A comprehensive curriculum of academic arts and sciences programs is offered by Calgary's primary and secondary schools, with a commitment to excellence and child-centred development. Calgary is also served by a growing number of private, charter and alternative schools.

Alberta and Calgary students ranked at the top in reading, mathematics and science in an international study undertaken by the Organization for Economic Cooperation & Development in 2003.

## Lifestyle



A modern metropolis with a cowboy culture. An exceptionally productive workforce that loves to play in the Rocky Mountains. A four-season city with abundant sunshine and warm chinook winds.

If ever a city offered the best of all worlds, surely it is Calgary.

By international standards, Calgary is young (founded just 130 years ago), but it is confident and successful. For most of the past century the city has hosted “The Greatest Outdoor Show on Earth,” the annual Calgary Exhibition and Stampede. In 1988, the city welcomed the world to the “best-ever” Olympic Winter Games, demonstrating not only its friendly spirit, but its “we-can-do-it” attitude. These events reflect Calgarians’ love of the Old West and winter sports, particularly skiing and ice hockey.

Indeed, Calgarians were dubbed the greatest sports fans in the world in 2004 when the underdog Calgary Flames made it to the NHL’s Stanley Cup finals.

Calgarians love to work and play. They are Canada’s most productive workers – and arguably they have Canada’s greatest backyard: the majestic Rocky Mountains which include Banff National Park and Kananaskis Country.

Within city limits are the Bow River, one of the finest trout rivers in the world, more than two dozen golf courses and three dozen parks connected by 580 kilometres of cycling and pedestrian pathways and 260 kilometres of on-street bike routes. Calgary’s natural environment is one of the city’s greatest assets. Citizens and government alike are deeply committed to protecting and preserving the river valleys and environmentally sensitive areas as well as the integrity of its communities.

First-class facilities such as the Pengrowth Olympic Saddledome, Spruce Meadows and Canada Olympic Park provide additional recreational opportunities and act as training and performance venues for some of the world’s best athletes. As well, recreational facilities abound, such as community ice hockey arenas, swimming pools, soccer pitches and more.

Calgary's moderate climate accommodates year-round outdoor activities. The city receives 2,395 hours of sunshine a year. The average daily high in summer (June, July and August) is 22.3° C; the average daily high in winter (December, January and February) is -2.3° C, although daytime temperatures of 10° C are common during chinooks, periodic warm western winds.

Arts and culture thrive in the city. The Epcor Centre of Performing Arts is home to several professional theatre companies and the Calgary Philharmonic Orchestra, and hosts hundreds of touring performers every year. Arts and artifacts take centre stage at the city's two museums: the Glenbow Museum and the Nickle Arts Museum. With programs in drawing, painting, sculpture, photography, glass, ceramics and other arts, the Alberta College of Art and Design helps educate and expand Calgary's artistic community.

In the performing arts, One Yellow Rabbit's High Performance Rodeo is Canada's leading festival of new and experimental theatre, combining theatre, dance, poetry, music, radio drama, video art and spoken word. The Esther Honens International Piano Competition, the International Organ Festival, Theatre Calgary, the Alberta Ballet, Alberta Theatre Projects and Calgary's Folk Festival are other world-class cultural organizations and events in Calgary cultural community.

During the 1980s, Calgarians relied on their entrepreneurial spirit to weather economic ups and downs; today, approximately 13 per cent of Calgary's workers are self-employed.

## ADDITIONAL INFORMATION

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For additional information on Calgary's Aerospace industry, or to learn more about the many services offered by Calgary Economic Development, please contact:

### **Calgary Economic Development**

731 - 1st Street S.E.

Calgary, Alberta T2G 2G9

Phone: (403) 221-7831 or toll-free: 1-888-222-5855

Fax: (403) 221-7828

Email: [info@calgaryeconomicdevelopment.com](mailto:info@calgaryeconomicdevelopment.com)

[www.calgaryeconomicdevelopment.com](http://www.calgaryeconomicdevelopment.com)



CALGARY  
ECONOMIC  
DEVELOPMENT



731 – 1st Street S.E.

Calgary, Alberta

Canada

T2G 2G9

Phone: 403-221-7831

or toll-free: 1-888-222-5855

Fax: 403-221-7828

Email: [info@calgaryeconomicdevelopment.com](mailto:info@calgaryeconomicdevelopment.com)

[www.calgaryeconomicdevelopment.com](http://www.calgaryeconomicdevelopment.com)