

Opportunities...

Unmanned Vehicle Systems (UVS)

Aerospace and Defense

Industry Overview

The Eastern Alberta Trade Corridor (EATC) has a strong presence in the aerospace and defence industry, with three Canadian Forces Bases, the Canadian Center for Unmanned Vehicle Systems, and many aerospace related facilities and companies. In fact, more than 170 aerospace and aviation companies are located within Alberta, employing over 6,000 highly skilled Albertans and contributing \$1.3 billion in annual revenue to the provincial economy. Alberta's expertise within niche sectors such as robotics, unmanned vehicle systems, defence electronics, space science and geomatics is highly-regarded and recognized world-wide.

Industry Facts:

- Over 170 companies employing over 6,000 skilled workers
- Annual revenues over \$1.3 billion
- 40% of overall production destined to export markets
- Significant military presence with three immense, instrumented weapons ranges
- Defense Research and Development Suffield is internationally recognized for its R&D in chemical/biological defense

Sector Overview

While unmanned vehicle systems have been providing useful services for decades, more recent advances in computing, power and materials technologies are fueling rapid growth in unmanned systems capabilities and applications development.

It is anticipated that unmanned aerial vehicle (UAV) spending will nearly double over the next decade, growing from current worldwide UAV expenditures of \$5.9 billion to \$11.3 billion annually. These annual totals are projected to reach more than \$94 billion in the next 10 years according to a study presented at the Association for Unmanned Vehicle Systems International. Spending levels in the older manned-platforms and outdated war-fighting technology will likely reduce; however, world governments will continue to spend money on cutting-edge defense technology. UAVs, related hardware, and specialized services are set to dominate military spending growth in the coming decade



Market Overview

Alberta has emerged as Canada's leader in the development of unmanned vehicle systems with more than 70 Alberta companies, military agencies and educational institutions working in various forms of UVS research, testing, development and manufacturing. The UVS industry is especially strong in Eastern Alberta. This innovative niche is expected to grow tremendously in the coming years because of its wide-ranging applications for both military and commercial use. Alberta is home to a host of companies that have significant expertise in various facets of UVS development, with especially strong skills in:

Market Assessment

The Alberta market and the EATC region in particular, provide unique investment opportunities for local and multinational firms seeking to develop technologies in the UVS industry. The Canadian Center for Unmanned Vehicle Systems, one of this sector's strongest assets, is located in Medicine Hat, Alberta. The CCUVS is a not-for-profit company, whose purpose is to facilitate sustained and profitable growth in the Canadian unmanned systems sector. The Center offers a multitude of services including testing and evaluation, support (including a launcher for air-land-sea search), education, consultancy and flight operation certification.



- Command and Control Systems
- Remote Sensing
- Avionics Navigation Systems
- Global Positioning Systems
- Systems Integration
- Wireless Communications
- Nanotechnology
- Manufacturing

There is another very unique feature that UVS developers can take advantage of. There are three Canadian Forces Bases located within the EATC region, each in relatively close proximity to the other. These bases allow access to formal test ranges and segregated airspace for the development of UVS technologies.

These three bases include:

- **Canadian Forces Base Cold Lake**

The busiest fighter base in Canada provides general purpose, multi-role, combat capable forces in support of domestic and international roles of Canada's Air Force.

- **Canadian Forces Base Suffield (also CFB Suffield)**

The largest Canadian Forces Base and the largest Commonwealth military training base in the world

- **CFB Wainwright**

Primarily a training base for the Canadian Army, it is also used by the Royal Canadian Air Force to train fighter bombers and for 'search and rescue' practice.

In addition to formal test ranges at local air force bases, the CCUVS runs a test facility in Southern Alberta. The Foremost Alberta Testing and Training Facility offers a test facility with low air traffic and population densities, vast airspace, extended line of sight, modern hangar and control building, and a newly paved runway.





The Eastern Alberta Trade Corridor is a major initiative underway to enhance and promote a north/south transportation corridor that stretches from the US border in the south to the R.M. of Wood Buffalo in the north. The Eastern Alberta Trade Corridor will include Highways 36, 41 and 63, with links to the Edmonton-Calgary corridor to the west, to Alberta's abundant resources in the north east, and to Saskatchewan in the east. It is a major component of the "Ports to Plains Corridor" of the United States, Canada and Mexico.

There are over \$100 billion in Major Capital Projects happening right now in the Eastern Alberta Trade Corridor (EATC). The EATC is part of the world's third largest oil reserves - the Alberta Oil Sands.

Why are businesses investing in the EATC?

- Great location between markets and suppliers in Northern Alberta and the U.S.
- Close access to major centres, but with low land costs
- Excellent north-south and east-west transportation routes
- Plenty of room to expand operations
- Diversified business sectors including energy, agriculture and manufacturing
- Excellent quality of life to attract new workers



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