

Final Report

An Assessment of Economic Benefits Resulting from the Operation of the NATO Flying Training in Canada (NFTC) Program at Moose Jaw, Saskatchewan

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Executive Summary

The Moose Jaw Air Base has had a nearly 75 year history with Moose Jaw involving flight training for Canadian and international military pilots. Most recently the Base has housed the NATO Flying Training in Canada (NFTC) Program. The NFTC Program and 15 Wing Moose Jaw forms a large part of the Moose Jaw Community and an even larger part of the economy. NFTC creates significant direct and indirect employment impacts in the community and surrounding areas. The Base hosts several major employers such as the Department of National Defence (including 431 Squadron – the Snowbirds), Bombardier, Aramark, ATCO Frontec, CAE, and SERCO. These operations exist on the Base due to the continued existence of the NFTC Program. In total, the Program generates 920 person years of employment in Moose Jaw, or 6.1% of Moose Jaw’s entire labour force.

The following are some of the highlights found in this report:

Annual Impacts of the NFTC Program	
➤ Annual Economic Impact (Value Added) on Saskatchewan Economy	\$ 52.0 Million
➤ Employment Impact	
• Direct and Indirect Moose Jaw Employment	920 FTE
• Direct and Indirect Saskatchewan Employment	1,130 FTE
➤ Labour Income Impact	
• Direct and indirect Moose Jaw Income	\$ 39.1 Million
• Direct and Indirect Saskatchewan Income	\$48.0 Million
➤ Tax Impact	
• Federal / Provincial Income Tax	\$ 10.1 Million
• GST / PST Fuel Taxes	\$4.5 Million
• Payments to Municipal Governments	\$ 1.1 Million
➤ NFTC Training Sold to Other Nations (Total to Date)	\$ 1.13 Billion
One Time Impacts of the NFTC Program	
➤ Construction Impact	\$ 25.0 Million

1.0 Introduction

This report has been prepared for Western Economic Diversification Canada (WD). It has been developed in response to WD's request for an independent assessment of the economic impact resulting from the NATO Flying Training in Canada (NFTC) Program on the Moose Jaw and provincial economies. The NFTC is a partnership involving the Government of Canada represented by the Department of National Defense (DND) and Bombardier Inc. in the delivery of flight training for Canadian and International fighter pilots. It is a \$3.3 billion program involving a 20-year contract with Bombardier. The program is principally based at 15 Wing, Moose Jaw, located just outside of the city of Moose Jaw in the Rural Municipality of Moose Jaw. All basic pilot training passes through Moose Jaw (Phase II Basic Training) with specialized (advanced) training for multi engine and helicopter aircraft training taking place in Portage La Prairie, Manitoba and advanced tactical lead-in fighter training taking place at Cold Lake, Alberta.

2.0 Key Deliverables

The principal objective identified by WD for this report is to examine and describe the economic benefits to the Moose Jaw region and to the province of Saskatchewan that occurred as a result of the NFTC Program's presence in Moose Jaw. Within this overall objective the following deliverables were identified:

- Purchases at the local and provincial levels
- Direct and indirect employment generated in the region and the province
- Value of building construction
- Revenue generation to Canada from other nations
- New spin-off activities that have occurred in the Moose Jaw region
- Future possible economic benefits that could occur
- Other related economic development activities that have occurred in the Moose Jaw region

3.0 Background – The History of 15 Wing, Moose Jaw

The Moose Jaw Air Base has had a long history in the region. The base was originally founded in 1928 as a flying club. As World War Two began to escalate, the flying club evolved into the 32 Service Flying Training School (32SFTS) with major site construction in 1940. Starting January 1941, as part of the Commonwealth Air Training Plan, the base trained hundreds of Canadian, British, Norwegian, New Zealander, Polish, French, Czechoslovakian, Belgian, American and Dutch military pilots. Moose Jaw has had a long history with training domestic and international pilots.

The school was returned to civilian service in 1946. Six years later the site was again selected for military service as a military flight training school. In 1953 the base reopened as the Royal Canadian Air Force (RCAF) Station Moose Jaw and a major rehabilitation and construction program was initiated. The centre became the Canadian Forces Base (CFB) in 1968 after the Canadian forces were united under one title and housed the Tutor Jet Trainer Program. The name of the base was changed again to its current title, 15 Wing Moose Jaw. The titling is similar to the Department of National Defence air bases in other parts of Canada (i.e., 17 Wing Winnipeg, 4 Wing Cold Lake).

By the mid 1990s, CFB Moose Jaw was at the peak of its operating impact on the Moose Jaw region. It provided administrative and technical support to two Canadian Forces Flying Training Schools and to 431 Air Demonstration (AD) Squadron, better known as the Snowbirds, as well as to Detachment Dundurn and Saskatchewan District Militia Units.

The following are the key economic highlights from the operation of flight training and other administration and technical services provided at CFB Moose Jaw in 1994.

TABLE 1		
Economic Impact Highlights for CFB Moose Jaw – 1994		
➤ Total Employment		1,390
• Civilian (DND)	226	
• Civilian (Non-DND)	76 *	
• Military	1,088	
➤ Military Family Members		1,906
➤ Total Wages and Salaries		\$ 46.3 M
• Civilian (DND)	\$ 7.7 M	
• Civilian (Non-DND)	\$ 0.4 M	
• Military	\$ 38.2 M	
➤ Base Operating and Maintenance		\$ 22.4 M
➤ Base Operating and Maintenance (local expenditure @28.1%)		\$ 6.3 M
➤ Grant-in-Lieu to Local Government		\$ 0.47 M
* Largely part-time.		
Source: Department of National Defence, Canada – Operational Research and Analysis Project Report 721 – The Socio-Economic Impacts of Alternative Canadian Aerospace Training Project (CATP) options for CFB Moose Jaw on its Host Community – By B. Solomon and Louis Rasai, March 1995.		

A payroll of \$46.3 million and 1,390 employees is a major business. Based on employment and operating budget, CFB Moose Jaw would have been one of Saskatchewan's top 50 companies in 1994. At the time, CFB Moose Jaw would have been amongst the top ten employers in Saskatchewan. Certainly for the City of Moose Jaw, the base would have been the City's top business or industrial employer. Direct and indirect CFB Moose Jaw employment would have accounted for over 10% of Moose Jaw's total labour force in 1994.

In the early 1990s, the Department of National Defence began to examine its future pilot training options for a viable, cost-effective means of providing pilot training. Various options were examined from consolidating undergraduate pilot training at CFB Moose Jaw with a 25% across-the-board decrease to staff operating and maintenance, to removing pilot training from CFB Moose Jaw altogether and placing it elsewhere. This second option, if implemented, would have led to the closure of the Base which would have had significant negative impact on the local economy. It would have also resulted in the relocation of the Snowbirds to some other military air base and the end of a long association between Moose Jaw and one of Canada's leading icons. In a submission prepared by the City of Moose Jaw it was indicated that the closure of the base would result in:

- Population decline of 8-10%
- Labour force reduction of 12%
- Unemployment would rise by 3%
- Overall economic decline of 13%
- Income reduction of 22%

4.0 NATO Flight Training in Canada

The origin of the NFTC Program can be traced back to a 1994 Department of National Defence (DND) White Paper. This paper called for major cuts in defence spending of 25%. The DND was being directed to reduce costs and to operate with fewer resources, fewer people and less infrastructure. DND was also asked to adopt better practices and to seek new ways of program delivery such as transferring in-house support services to industry where a business case analysis would support it. As a result, DND began to look at Alternative Service Delivery (ASD) for the delivery of non-core activities and internal services.

In 1994, Bombardier Inc. submitted an unsolicited proposal to DND to provide a NATO Flying Training Program. This program then became the preferred option for DND to provide Canadian forces pilot training. At the time, DND did not have sufficient funds to renew its aging Tutor training aircraft fleet. In October 1997, Treasury Board approved a submission by Public Works and Government Services Canada, on behalf of DND, for a non-competitive contract with Bombardier Inc. to deliver the Program.

The \$3.3 Billion NATO Flying Training Canada (NFTC) program is an undergraduate and postgraduate military pilot training program offered by the Government of Canada, in cooperation with industry, to NATO and other nations seeking affordable military flying training solutions. NFTC is viewed by National Defence as a cooperative approach to training military jet pilots, based on a partnering between government and industry. Canadian and NATO air force pilots provide the flying instruction. The industry team, led by Bombardier Aerospace Defence Systems Division under a 20-year contract, provides the aircraft, training simulators, training material, airfield and site support services, aircraft maintenance services and other services. Under the terms of the contract, the military fighter pilot training program is made available to the Canadian Forces as well as to the military air forces of other NATO member nations who choose to participate.

The flight training takes place at Canadian Forces Base Moose Jaw and the base in Cold Lake. The government licensed the use of Moose Jaw and Cold Lake bases to Milit-Air Inc., an independent non-profit organization incorporated for the sole purposes of the flight-training program. Milit-Air Inc. purchases the planes, flight simulators and other equipment. Bombardier Inc. was appointed Milit-Air Inc.'s agent for the negotiation and purchase of the equipment. In addition, Milit-Air Inc. has granted Bombardier Inc. the right to use the facilities at the bases for flight training. By way of a separate agreement, Milit-Air Inc. has leased the equipment to Bombardier Inc. Under the Canada Services Agreement, Bombardier Inc. provides certain ground-based training and maintains the planes, equipment and base facilities; the Canadian government pays tuition fees.

The tuition fees payable by Canada comprise several components: transition fees, firm fixed fees, firm fees (covering maintenance of aircraft and administration of premises), variable fees (covering life-sensitive spares, consumable spares and engine overhauls) and reimbursable costs (oxygen and petroleum). The firm fixed fees are payable semi-annually for 20 years, whether or not Canada trains the full number of pilots it is entitled to under the agreement. However, the agreement allows Canada to sell some of its unused pilot training to other countries.

About \$1.3 billion of the contract funds were used to acquire flight simulators and a new fleet of 42 military training aircraft. A total \$1.5 billion was to be used by the Bombardier-led industry team to maintain the aircraft and the simulators, manage the base in Moose Jaw, and provide ground school instructors. DND provides the overall management of the NFTC program as well as the flight instructors.

In addition to the primary objective of developing a cost-effective pilot training program, NFTC could potentially offer a number of other related benefits. These are:

- creating employment;
- demonstrating the capabilities of Canada's aerospace industry; and,
- making a significant contribution to NATO.

The following sections describe the program in more detail.

NFTC Phases of Training

- **Phase II** Basic Flying Training is conducted at 15 Wing Moose Jaw on the Raytheon Harvard II aircraft. The Phase II course is six and one-half to eight months long depending on the time of year. The Phase II syllabus includes 94 flying hours and 36 simulator hours.
- **Phase IIB** is the Phase III preparatory course for pilots destined for fighter aircraft. It is conducted at 15 Wing Moose Jaw on the Harvard II. There are 47 flying hours and 4 simulator hours in the Phase IIB syllabus.
- **Phase III** Advanced Flying Training is carried out on the BAE SYSTEMS Hawk 115 aircraft at 15 Wing Moose Jaw. The Phase III course is five to six months in duration, again, depending on the time of year. The Phase III syllabus includes 71 flying hours and 31 simulator hours.
- **Phase IV**, the Tactical Fighter Lead-in Training phase, is flown on the Hawk 115 at 4 Wing Cold Lake. Phase IV is a four month course and includes 49 flying hours and 18 simulator hours.

NFTC Aircraft

- **Raytheon Aircraft Company T-6A Harvard II (CT 156)** – NFTC Phase II and Phase IIB training is carried out on the Harvard II aircraft. Apart from some minor changes to optimize the aircraft for the Canadian operating environment, this is the same aircraft that won the USN/USAF JPATS competition. In the U.S., the T-6A is known as the ‘Texan II’. The Hellenic Air Force has also acquired the T-6A. The NFTC Program has 24 Harvard II aircraft, all of which are based at 15 Wing Moose Jaw. The first Harvard II was delivered to Moose Jaw on 29 February 2000 and the 24th aircraft arrived in December 2000. Two more have been ordered and will be delivered within this FY.
- **BAE SYSTEMS Hawk 115 (CT 155)** – The Hawk 115 is the NFTC Phase III and Phase IV training aircraft. Seventeen countries have ordered or taken delivery of the Hawk, in all its variants. The NFTC Program has ordered 22 Hawk 115 aircraft. About 60% of the fleet is based at 15 Wing Moose Jaw for Phase III training, Hawk 115 Conversion training and base level maintenance. The remaining 40% of the fleet is based at 4 Wing Cold Lake for Phase IV Tactical Fighter Lead-in Training. The first Hawk 115 arrived at Moose Jaw on 05 July 2000. By September 2002, 20 Hawks had been delivered to NFTC. Two additional Hawks have been ordered, for delivery in January 2005.

NFTC Simulators

- **CAE Harvard II Level 7 Flight Training Device (FTD)** – One ‘four-channel’ and two ‘eight-channel’ visual system Harvard II FTDs (simulators without motion systems) are located at 15 Wing Moose Jaw. They are equipped with ‘G’ cue seats. The cockpit and handling fidelity is equal to that found on full flight simulators.
- **CAE Hawk 115 Level 7 Flight Training Device (FTD)** – NFTC has two ‘eight-channel’ visual system Hawk 115 FTDs, one at Moose Jaw and the other at Cold Lake. They are also equipped with ‘G’ cue seats. Like the Harvard II simulators, the cockpit and handling fidelity is equal to that found on full flight simulators.

Major Subcontractors

- The Government of Canada has a 20-year contract with Bombardier Aerospace, Defence Services to provide services in support of NFTC. Bombardier, in turn, has sub-contracts with BAE SYSTEMS, Raytheon Aircraft Company, CAE Inc. of Montreal, ATCO-Frontec Corporation of Edmonton, SERCO Aviation Services Inc. of Ottawa and ARAMARK Canada Ltd. of Toronto for the provision of equipment and various support services.

- In addition to these major subcontractors, there are several smaller subcontractors being managed by Bombardier for a variety of goods and services. In Saskatchewan, Bombardier manages approximately 200 subcontractors.

5.0 Direct and Indirect Economic Impacts Resulting from NFTC's Presence in Moose Jaw

Without the NFTC Program, there would be no need for 15 Wing Moose Jaw. Moose Jaw's sixty plus year history with military pilot training would have to end. Similarly, Moose Jaw's association with the Snowbirds would also come to an end. This chapter quantifies the direct and indirect economic benefits that have occurred for the Moose Jaw region as a result of the NFTC Program's presence in the region since the official sod turning for the Program in July of 1998.

5.1 – Construction Impacts

Since the conversion to the NFTC Program there has been considerable construction that has been carried out on the Moose Jaw Air Base. This has included substantial renovations to aircraft hangars (Bombardier), development of the new NFTC multipurpose facility by Bombardier (Col. O. B. Philip Building), demolition (Bombardier), and construction of new single quarters barracks for pilots (Department of National Defense). Expenditures to date have totaled approximately \$25 million. Similarly, 4 Wing Cold Lake has seen \$12 million in construction of new NFTC multipurpose facilities and other infrastructure upgrades.

Bombardier	\$17,000,000
Department of National Defense	\$8,000,000
Total	\$25,000,000

After reductions for out-of-province inputs (22%) and utilizing multipliers derived from previous Moose Jaw specific work (1.367) the total economic impact of the construction would be \$26.7 million. The total labour impact would be \$9.3 million creating 234 person years of employment.

This is not inclusive of capital maintenance expenditures made on a year to year basis. Regular capital maintenance has been included in the operations and maintenance expenditure.

5.2 – Operation Impacts

There are two major sources of expenditures attributed to the base – Bombardier and the Department of National Defence (DND). Both Bombardier and DND (including 431 Squadron – Snowbirds) have significant local labour and operations/maintenance expenditures as well as other ancillary impacts.

5.2.1 – Bombardier

There are two major sources of provincial and local expenditure associated with Bombardier. The first is Bombardier’s labour force located at 15 Wing Air Base and the second is the Bombardier subcontractors and suppliers.

Bombardier itself has a significant direct expenditure in terms of employment. Bombardier directly employs 210 people, generating \$9,450,000 in annual labour expenditure. These individuals are all located in Saskatchewan and 90% of Bombardier’s labour force lives in Moose Jaw.

To date, over the last 29 months, Bombardier has spent \$78 million on local and provincial operating expenditures involving 193 different suppliers and contractors (see Appendix 1.0). On an annualized basis, this has resulted in \$30 million local and provincial in operating and maintenance expenditure. This includes contracts with the following major on-site subcontractors:

		On-Site Contractors (FTE¹)
➤ ATCO Frontec	–	45 employees
➤ Aramark	–	40 employees
➤ SERCO	–	17 employees
➤ CAE	–	13 employees
➤ Other	–	3 employees

¹ Full-time equivalent (FTE).

These subcontractors themselves, with 118 employees on site, would generate \$3,750,000 in annual labour expenditure. Similar to Bombardier's labour force, 90% of the employees working for these subcontractors would live in Moose Jaw. Including the major subcontractors, Bombardier has 193 contracts with local and provincially based suppliers for various goods and services. It is estimated that 43% of subcontractor expenditure is captured by the Moose Jaw region.

The following table describes the total expenditure that is associated with Bombardier's operational management of the NFTC Program.

TABLE 3				
Local and Provincial Bombardier and Subcontractor Expenditure				
Categories	Employment (FTE²)	Local Expenditure	Provincial Expenditure	Total Annual Expenditure
Bombardier (Labour Only) Expenditure				
Bombardier Expenditure (Labour Only) Total	210	\$8,505,000	\$945,000	\$9,450,000
Subcontractor Operating/Maintenance Expenditure³				
Program Management & Aircraft Maintenance	55	\$3,090,000	\$4,040,000	\$7,130,000
Aircraft/Aerospace Related	12	\$665,000	\$870,000	\$1,535,000
Site Support Services	164	\$9,245,000	\$12,090,000	\$21,335,000
Operating/Maintenance Total	231	\$13,000,000	\$17,000,000	\$30,000,000
Total Bombardier (Labour Only) and Subcontractor Operating and Maintenance Expenditure	441	\$21,505,000	\$17,945,000⁴	\$39,450,000

² Full Time Equivalent (FTE) positions

³ Expenditures go to 193 Provincial sub-contractors and suppliers

⁴ Over 90% of expenditures outside of Moose Jaw are made in Regina

5.2.2 – Department of National Defence

The DND has the single largest personnel representation on the Base. There are approximately 391 DND employees on the Base, consisting of military personnel (240), civilians (20), reservists (40), and the 431 Squadron – Snowbirds (91). Reservists are utilized to fill skilled positions that are difficult to fill on the Base and are, for the most part, full time positions. The total labour expenditure is \$21,505,000.

DND and the 431 Squadron (Snowbirds) also have a combined operations and maintenance expenditure of \$7.4 million. The local Moose Jaw economy captures 84.3% of total provincial DND expenditure related to the Moose Jaw Air Base.

Table 4				
Department of National Defence Expenditure				
Categories	Employment (FTE)	Local Expenditure	Provincial Expenditure	Total Annual Expenditure
Labour Expenditure				
DND	300	\$14,850,000	\$1,650,000	\$16,500,000
431 Squadron Snowbirds	91	\$4,505,000	\$500,000	\$5,005,000
Total	391	\$19,355,000	\$2,150,000	\$21,505,000
Operation/Maintenance Expenditure				
DND	32	\$2,000,000	\$1,500,000	\$3,500,000
431 Squadron Snowbirds		\$3,000,000	\$900,000	\$3,900,000
Operation/Maintenance Total	32	\$5,000,000	\$2,400,000	\$7,400,000
DND Total	423	\$24,355,000	\$4,550,000	\$28,905,000

5.2.3 – Total Employment and Operating Expenditure

The total employment generated through DND and Bombardier is 864 FTEs of which 601 or 69.6% are directly employed by DND and Bombardier. Of the \$70 million in expenditure captured for the Saskatchewan economy, the Moose Jaw Region's economy accounts for 67.1%

TABLE 5**Total Base Direct Expenditures by Source**

Categories	Employment (FTE)	Local Expenditure	Provincial Expenditure	Total Annual Expenditure
Labour Expenditure				
Direct Bombardier Employment	210	\$8,505,000	\$945,000	\$9,450,000
Direct DND Employment	391	\$19,355,000	\$2,150,000	\$21,505,000
Total	601	\$27,860,000	\$3,095,000	\$30,955,000
Operation/Maintenance Expenditures				
Bombardier Subcontractors	231	\$13,000,000	\$17,000,000	\$30,000,000
DND	32	\$5,000,000	\$2,400,000	\$7,400,000
Operation/Maintenance Total	263	\$18,000,000	\$19,400,000	\$37,400,000
Total Expenditures	864	\$45,860,000	\$22,495,000	\$68,355,000

5.2.4 – Economic Impacts

The total economic impact must be derived from the direct expenditures. The total expenditure is not a perfect measure of the economic impact for two reasons. First, it does not account for demand that will be met by out-of-province suppliers through inputs or through leakage from the economy. Second, it does not take into account the multiplier effect that occurs when other industries in the economy are positively impacted by the initial expenditure.

Labour Impacts

The total labour expenditure is not equivalent to net labour income. Net labour income is the total income that income earners will actually be able to spend in the economy. To arrive at the direct net income impact components such as taxes and leakages were removed. The remaining expenditure will have its own impact on the economy creating indirect impacts and employment.

Statistics Canada does not provide a specific multiplier for the impact of labour expenditure so one was generated based on previous regionally specific work (1.37).

TABLE 6
Labour Expenditure Impact (Excluding Operations and Maintenance)

	Labour Expenditure	Net Labour Income Impact⁵	Employment Impact	Indirect Impact	Total Impact
Labour Impact	\$ 30,955,000	\$ 15,940,000	137	\$ 6,252,000	\$21,785,000

Operations and Maintenance Impacts

Because of their different impacts on the economy, the operations and maintenance expenditures are analyzed separately from the labour expenditures. The following table deals with the impacts of the operations and maintenance expenditure. The most important number derived here is the GDP impact as it reflects the true economic impact of the operation and maintenance expenditures base.

To remove the double counting and imported inputs Statistics Canada's input-output multipliers for the Air Transport and Related Services industry were utilized. A multiplier of 1.47 was utilized to derive the Gross Domestic Product (GDP) of the operations and maintenance expenditure. Labour was assumed to be 22% of the total expenditure.

TABLE 7
Operations and Maintenance Total Impacts

	Direct Impact	Indirect Impact	Total Impact⁶
Output Impact	\$37,400,000	\$15,533,000	\$52,933,000
GDP Impact	\$20,616,000	\$9,658,000	\$30,274,000
Employment Impact	231	161	392
Labour Income Impact	\$8,074,000	\$5,645,000	\$13,719,000

⁵ After adjusting for relevant taxes, other deductions, and leakages.

⁶ Derived using the Air Transport and Related Services Industry Sector multipliers for Saskatchewan – Statistics Canada Input-Output Model

5.2.5 – Total Impacts

The NFTC Program has a substantial impact on the economy of Moose Jaw and region. Employment generated by the Program accounts for 6.1% of the employment in the Moose Jaw region. Direct and indirect employees and their families account for 5.2% of the population. The gross labour income generated in Moose Jaw, \$39,063,000, comprises 10% of the Moose Jaw region's gross labour income.

Over 90% of the provincial impacts of the Program would be felt in the Regina and Moose Jaw Regions (94% of the provincial suppliers and contractors are in Regina or Moose Jaw).

TABLE 8		
Total Impacts of NFTC Base Moose Jaw		
	Moose Jaw Region	Total Saskatchewan⁷
Operations and Maintenance GDP	\$12,864,000	\$30,274,000
Labour Income Value Added	\$19,607,000	\$21,785,000
Total Economic Impact	\$32,471,000	\$52,059,000
Total Gross Wages (all sources)	\$39,063,000	\$47,980,000 ⁸
Direct Employment	719 ⁹	832 ¹⁰
Direct and Indirect Employment	920	1,130
Total NFTC Employees and Family	1,815	2,290

While the total local and provincial expenditure is \$68.4 million, the total Value Added impact is \$52.1 million. Value Added is a more precise measure of the true economic impact of the Base because it counts only the value added to the industry within the Province. More specifically Value Added eliminates the factors of production that were imported or have already been counted.

Another significant number is the total wages generated. Within Moose Jaw the direct, contracted and indirect wages generated are \$39,063,000. This accounts for just over 10% of the total wages paid in Moose Jaw. This is a reflection of the large impact the Base has on the community.

6.0 Revenue Generation to Canada from Other Nations

⁷ Over 90% of the expenditure outside Moose Jaw would occur in Regina

⁸ Included: DND direct labour (\$21,505,000), Bombardier direct labour (\$9,450,000), contractors and suppliers (\$8,085,000), indirect labour income (\$8,940,000)

⁹ On the NFTC Base

¹⁰ Direct employees of DND, Bombardier, and direct contractors/suppliers

Training military pilots is expensive. It is estimated that it costs \$2.5 to \$2.8 million to train just one military pilot. The NFTC Program has provided Canada with significant industrial benefits while reducing the cost of military pilot training to the Canadian taxpayers. In addition to allowing 15 Wing Moose Jaw to remain open for at least another 20 years, the Program will generate almost \$1 billion in direct industrial benefits for Canada, including over 5,600 person-years of employment in high technology and knowledge-based Canadian industries such as CAE.

One of the biggest benefits to Canada is the export of the NFTC Program to other nations. NFTC marketing is a joint exercise between the air force and industry. As part of the contract, DND has provided assurances that it will market the Program until it reaches its projected annual number of foreign students. The following Nations are involved in the NFTC Program.

- **The Royal Danish Air Force (RDAF)** sends six student pilots per year through Phase II, of which 5 go on to Phases IIB, III and IV. If the 6th student passes, he/she goes to Portage for either Hel or ME training. RDAF student pilots began Phase II training at Moose Jaw in October 2000.
- **The Royal Air Force (RAF)** sends 20 pilots per year through a Hawk 115 aircraft conversion course at 15 Wing Moose Jaw followed by Phase IV training at 4 Wing Cold Lake. RAF pilots began Hawk 115 Conversion Training in March 2001 and Phase IV training in May 2001.
- **The Republic of Singapore Air Force (RSAF)** sends six pilots per year through Phases III and IV. The first Singaporean student pilots began Phase III on the Hawk 115 at Moose Jaw in December 2000. Singapore students take an extended Phase IV, adding 6 AI trips at the end of the Phase.
- **The Italian Air Force (IAF)** sends three student pilots per year through Phases II, and two or three (depending on success rate) on to IIB, III and IV. The first Italian student pilots began Phase II training at Moose Jaw in June 2000.
- **The Hungarian Air Force (HuAF)** will be sending 20 experienced pilots for Hawk conversion training and Phase IV during 2002 and 2003 to prepare them for the arrival of Gripen in the HuAF.
- **The Hungarian Air Force (HuAF)** will also send seven pilots per year for Phase II training commencing in the fall of 2003. Five of these students will continue through Phase IIB, II and IV while the remaining two students will follow the helicopter stream at Portage la Prairie.
- **The German Air Force** is providing 3 Hawk instructors in Moose Jaw and 1 Hawk instructor in Cold Lake. Two more instructors will join later in 2002.

- **Finland is expected to provide one instructor for Phase IV starting late this year. MOU negotiations are almost complete.**

To date, Canada has exported (sold) \$1.13 billion worth of NFTC training to other nations noted above. NFTC fees include incremental costs plus a fair share of fixed costs. Approximately \$400 million of foreign fees is for these “fair share” elements and, therefore, reduces the cost Canada would otherwise incur.

7.0 Other Impacts Resulting from NFTC Program Operations

In addition to the foregoing employment, income and expenditure impacts that result from the delivery of the NFTC Program, other impacts have also resulted such as tourism, student pilot expenditure, other revenue generation that local government bodies receive as a result of the NFTC Program, and federal/provincial tax revenues.

7.1 – Tourism Impacts

A significant tourism expenditure impact would have been associated with the Moose Jaw Air Show which until recently was an annual event held at 15 Wing. The Air Show was a co-operative partnership between the Base and the local tourism authority. The Moose Jaw Air Show dates back to the early 1970s. It has been the largest air show in the province drawing between 30,000 and 35,000 visitors over two days. (At one time the Air Show attracted over 100,000 visitors.) Over 70% of the visitors to the Show are tourists, having traveled 70 km or more to attend the show. An economic impact assessment of the Air Show was completed by Tourism Saskatchewan in 1997. At that time it was estimated that the Show generated \$1.23 million in gross output and would have generated 29 full and part-time jobs for the local economy.

Unfortunately the Air Show has not been held for the last two years due principally to administrative and organizational difficulties. However, the community is pursuing the return of the Air Show in 2003.

Based on interviews with representatives from the Base and local tourism officials, the Base itself can be conservatively estimated to generate 800 person trips annually. According to Destination Moose Jaw and the Canadian Tourism Commission the average trip expenditures for trips to Moose Jaw is \$197/leisure traveler, and \$245/business traveler. The total direct tourism expenditure resulting from trips to the base, such as visiting friends and relatives would be \$181,100 annually.

7.2 – Student Pilot Expenditure in the Local Economy

Unlike traditional students, student pilots are already members of the armed forces, and as such earn a salary. The average salary of students in training is generally in the range of \$21,000 and \$39,000 annually, or an average of \$30,000. The combined income of pilots (140 on average) on the Base is \$4.2 million annually.

While the average salary for pilots in training is low compared to others on the Base, their disposable income is high because of their low cost of living. The students live and eat on the Base. It is estimated that the students would have \$1.0 M in disposable income to spend in the surrounding community.

7.3 – Moose Jaw Board of Education – Revenue Generation

One of the related economic impacts of the Base operation is an increased Education Grant Recognition from the Province. This grant is paid by the Province on a per student basis directly towards the operation of the local education system. The provincial grant is \$5,000 per student. In Moose Jaw's case, 50% of this funding comes from the Province. Incremental funds received by Moose Jaw would be at a rate of \$2,500 per student.

The total number of students directly associated with the air force base attending public and separate school in the Moose Jaw district is approximately 630. The total incremental funding received by the Moose Jaw Board of Education and the Catholic Separate School Board because of increased enrollment associated with the Base is \$1.6 million annually.

7.4 – City of Moose Jaw – Payments for Fire Fighting Services

The City of Moose Jaw is paid \$570,000 by the Base for structural fire fighting. There are fire-fighting forces on the base, but none dedicated to dealing with the structures on the base.

7.5 – Rural Municipality of Moose Jaw – Payments and Fees

The Rural Municipality of Moose Jaw receives a Payment in Lieu of Taxes (PILT) on an annual basis. The total annual payment is approximately \$570,000. The rural municipality also receives other fees such as building permits. Building permits have amounted to a total of just over \$50,000.

7.6 – Federal and Provincial Taxes Generated

The taxes generated by the Base for Federal and Provincial governments are substantial. Federal and provincial income taxes are based on the total wages earned from the Base as well as the indirect wages stimulated. The total income taxes generated are \$10,121,000.

There are different exemptions and effective rates of PST and GST collection for groups associated with the Base. PST and GST are not paid by the DND. Bombardier pays taxes on most purchases and services. Employees will expend a portion of their labour income on taxable goods and services. There is also a portion of the GST (and to a lesser extent PST) rebated to the collection agents. Taking all this into consideration GST and PST paid by employees would be \$2.1 million. Taxes paid by Bombardier on operations/maintenance contracts and suppliers would be approximately \$2.4 M.

7.7 – Total – Summary of Other Impacts

The following table summarizes the total other impacts resulting from NFTC Program Operations.

TABLE 9	
Other Impacts of Base Operations	
Increased Tourism	\$.18 M
Increased Funding to Schools	\$1.6 M
Payment in lieu of taxes (RM of Moose Jaw)	\$.57 M
Service Agreement (City of Moose Jaw)	\$.57 M
PST / GST / Fuel Taxes	\$4.5 M
Total Federal/Provincial Income Tax	\$10.1 M
Student Pilot Spending	\$ 1.0 M
Total	\$ 18.52 M

8.0 Assessment of Spin-off Activities and Potential Economic Development Opportunities for the Moose Jaw Region

As demonstrated in the previous chapters, the NFTC Program has had and continues to have a major economic impact on the Moose Jaw regional economy. For the most part, that economic impact has been captured through the employment generated by DND, Bombardier Inc. and its subcontractors. For the suppliers located in the Moose Jaw region, it means additional sales for their product and services. It has also resulted in the increased presence of major suppliers such as Aramark Canada, SERCO and ATCO Frontec in Moose Jaw.

The Moose Jaw Regional Economic Development Authority Inc. (Moose Jaw REDA) has been actively looking at what additional spin-off activities and economic development opportunities could be captured as a result of 15 Wing's presence and the continuing operation of the NFTC Program at the base. The Calibre Group of Companies was engaged by the Moose Jaw REDA to analyze opportunities. A preliminary (Phase 1) analysis was carried out to determine a potential menu of possible opportunities. The following preliminary opportunities were identified and are listed in order of priority.

1. Snowbird Retention and Upgrade
2. Aircraft Maintenance Technical Training and Aerospace Education
3. Aerospace and Transportation Technology Park
4. Aerospace Vendor Development
5. NFTC Program Expansion
6. Aircraft Maintenance Facility
7. Aero Engine Repair and Overhaul
8. Aircraft Component Non-Destructive Technology
9. Air Force Navigator Training
10. Tourism Trade and Convention Program Development
11. Aerospace Software Training System, Consulting Services
12. Joint Air Force and Municipal Airport Development

In discussions with representatives from Calibre, it was indicated that these opportunities represented a potential opportunity that would require further analysis to assess which ones present the most realistic opportunities that would be “short listed” for more detailed development. We have reviewed them in consultation with both Calibre and DND and offer the following comments and observations.

1. Snowbird Retention and Upgrade

The Snowbirds or 431 Squadron is based at 15 Wing. Without the NFTC Program, there would be no need for 15 Wing and if there was no 15 Wing, the Snowbirds would be housed elsewhere. The Snowbirds have a significant economic impact in their own right with over 90 direct person years of employment within DND as well as related operations and maintenance expenditure. Clearly, retaining the 431 Squadron at 15 Wing is very important to the region’s economy.

Regarding upgrading the Snowbirds, what is meant here is replacing the existing Tutor aircraft currently flown by the Squadron with new aircraft such as the Hawk. The decision to do that will be entirely DND’s. Even with upgrading, the incremental impact on the regional economy will be minimal and the benefits of capital spending associated with the acquisition of new aircraft would be felt elsewhere.

2. Aircraft Maintenance and Technical Training and Aerospace Education

A provincially commissioned study identified a need within Saskatchewan and Western Canada for aircraft maintenance and engineering training and certification. The existing labour force is getting close to retirement and shortages are forecast for Moose Jaw and other aviation centres in Saskatchewan (Saskatoon and Prince Albert). There could be opportunities in the development of national and international training programs and certification on the BAE SYSTEM Hawk 115 and RATHEON Harvard II aircraft in conjunction with the international NATO Flying Training in Canada Program.

3. Aerospace and Transportation Technology Park

Research Parks have been developed in Regina and Saskatoon in association with the University of Regina and the University of Saskatchewan. They have tended to focus on specific industry clusters such as biotechnology, information technology (hardware) and agriculture in Saskatoon, and energy, information technology (software) and environmental technologies in Regina. A third Research Park is being developed in Prince Albert focusing on the forest industry.

The concept being pursued is for applied research to take place in conjunction with the technology that has already been adopted at 15 Wing. A logical location for the development of a Moose Jaw Aerospace and Transportation Technology Park from an applied research perspective would be near 15 Wing. However, the use of 15 Wing site infrastructure for anything other than the NFTC Program would be difficult and would require considerable negotiation with DND and Bombardier.

4. Aerospace Vendor Development

There are clearly opportunities for aerospace vendor development associated with the NFTC program. Currently \$78 million in expenditure is being contracted with Saskatchewan-based suppliers through Bombardier Inc. There could be opportunities to increase the regional share of the NFTC's total program expenditure such as in maintenance, electronic systems services and other more technical related services.

5. NFTC Program Expansion

While the local Moose Jaw REDA would like to see the NFTC Program expanded, that decision is clearly up to the Department of National Defence and Bombardier Inc. Both DND and Bombardier share a risk position with the program and any program expansion would be based on the development of a satisfactory business case.

6. Aircraft Maintenance Facility

Aircraft maintenance is currently provided at 15 Wing for the 431 Squadron Tutor Aircraft and the aircraft used by the NFTC Program.

An aircraft maintenance facility to maintain, repair and overhaul (MRO) specific types of aircraft, namely the BAE SYSTEM Hawk 115 and RATHEON Harvard II aircraft, could provide the Moose Jaw REDA with an opportunity.

7. Aero Engine Repair and Overhaul

At present no aircraft engines are being overhauled at 15 Wing. BAE, the supplier of Hawk aircraft supplies, sends all its engines back to its own plants for repairs and overhauls.

8. Aircraft Component Non-Destructive Testing

Currently, the technical capabilities to conduct this kind of testing are not available locally and would have to be developed.

9. Air Force Navigator Training

Currently, this is based almost entirely in Winnipeg and DND has indicated no desire to change this.

10. Tourism Trade and Convention Program Development

An immediate opportunity for the regional economy would be the return and possibly enhancement of the Moose Jaw Air Show. Given the overall development of Moose Jaw's tourism industry and the growth and expansion of attractions such as the Temple Gardens Mineral Spa, the Western Development Museum (a transportation themed museum that includes a Snowbirds exhibit), Casino Moose Jaw and the Tunnels, tourist attendance to the Air Show could be increased. It is an opportunity for the community, in cooperation with DND and Bombardier to showcase a major industry. The event could also be timed with Air Base reunions.

In cooperation with Saskatoon, the Moose Jaw REDA will be hosting a 2003 Western Aerospace Conference. This will be a two-day conference split between Saskatoon and Moose Jaw. It will be a fairly technical conference. While in Saskatoon, delegates will visit the Synchrotron facility. In developing this type of conference, the objective of the Moose Jaw REDA is to develop Moose Jaw's image as an aerospace industry centre.

11. Aerospace Software Training Systems and Consulting Services

Regina-based MicroAge, which has its own training centre, has a significant contract with the NFTC to provide IT and networking consulting services.

12. Joint Air Force and Municipal Airport Development

15 Wing is used exclusively for the NFTC Program and that will not change. Moose Jaw does have a municipal airport, which is located some distance from the air base.

9.0 Conclusions

The NFTC Program has had and will continue to have a major impact on the Moose Jaw and Provincial economies. The NFTC Program and the annual operation of 15 Wing is the largest industrial employer in the Moose Jaw region. The regional economy is the prime beneficiary of the \$68.4 million expenditure that occurs annually as a result of the NFTC's presence in the region. The Moose Jaw regional economy captures 67% of this expenditure. Key highlights from the economic impact assessment of the NFTC Program include:

- \$25 million in new construction expenditure
- \$68.4 million in annual operating expenditure
 - Moose Jaw Region – \$ 45.9 Million
 - Other Saskatchewan – \$ 22.5 Million
- 1,130 direct and indirect jobs
 - Moose Jaw Region – 920
 - Other Saskatchewan – 210
- \$48 million in direct and indirect labour income
 - Moose Jaw Region – \$ 39.1 Million
 - Other Saskatchewan – \$ 8.9 Million
- \$10.1 million in annual income tax revenue
- \$4.5 million in annual GST, PST and other tax revenue.
- Total employee and family population of 2,290.

The impacts on the Moose Jaw Region are significant.

- The NFTC Program and 15 Wing accounts for 6.1% of Moose Jaw's employed labour force.

- Construction expenditure at 15 Wing since 1998 has accounted for 26.5% of the value of all construction building permits issued in the local economy from 1998 to 2001.
- The Base employees and family members account for 5.4% of Moose Jaw's entire population.
- Labour income generated by the Base would account for 10% of the Moose Jaw region's gross labour income.

APPENDIX 1.0

Bombardier Inc. – Subcontractors and Suppliers

Company	Service	City
Crown Advertising	Miscellaneous	Estevan
Trail Tech	Trailers	Gravelbourg
CAE	Flight Simulation Services	Moose Jaw
Tool Crib	Tools	Moose Jaw
Prairie Janitorial Supply Company	Janitorial Supplies	Moose Jaw
Inkmedia Communications	Printing Services	Moose Jaw
Temple Gardens Mineral Spa	Hotel & Catering Service	Moose Jaw
Don's Photo Shop	Camera Equipment	Moose Jaw
	Services, watrher & runway	
SERCO	maintenance	Moose Jaw
Moose Jaw Ford Sales	Vehicles and Services	Moose Jaw
UAP NAP Moose Jaw	Vehicle /line vehicle support	Moose Jaw
Precision Weld & Fab	Welding Services	Moose Jaw
Acklands Grainger	tools and associated equipment	Moose Jaw
	hardware, tools, miscellaneous	
Canadian Tire	supplies	Moose Jaw
Joe's Locksmith	Locks & Keys	Moose Jaw
Aramark Canada	Cleaning & Food Services	Moose Jaw
Rogers Cantel	Cell Phones	Moose Jaw
Culligan Water	Water delivery	Moose Jaw
Intrex On Line Services	Computer Support	Moose Jaw
3M Trim Line Moose Jaw	Vehicle /line vehicle support	Moose Jaw
B & T Crane Service	Crane service	Moose Jaw
Canadian Linen & Uniform	Cleaning Service	Moose Jaw
ATCO Frontec	Maintenance Services	Moose Jaw
Wells Camera Shop	Camera Equipment	Moose Jaw
Wal Mart	Miscellaneous	Moose Jaw
C&S Builders Ltd	Construction	Moose Jaw
Grand Valley Press	Printing Services	Moose Jaw
Kathy's Custom Stitchery	Miscellaneous	Moose Jaw
Ashdowns	Furniture/Appliances	Moose Jaw
Arrow Electric	Vehicle /line vehicle support	Moose Jaw
York Auto Supply	vehicle support	Moose Jaw
National Car Rental	Car rental	Moose Jaw
Robin Hartzell Fab	Class room Aids	Moose Jaw
Home Hardware	Lumber/supplies	Moose Jaw
Detail Moving Ltd	Moving Services	Moose Jaw
Arts Flat Deck Services	Transport Services	Moose Jaw
Minute Muffler & Brake	Vehicle Support	Moose Jaw
Western Machine and welding	Vehicle support	Moose Jaw
Peavey Mart	Tools/Hardware	Moose Jaw

Company	Service	City
Fern Paulhas	Ground search	Moose Jaw
Maritek Computer Products	Computer parts	Moose Jaw
Beaver Lumber	Lumber/supplies	Moose Jaw
Wesmor Plumbing & Heating Ltd	Plumbing /Air conditioning	Moose Jaw
The Oak & Rose Book Shop	Books/Magazines	Moose Jaw
Cushing Millwork Co Ltd	Cabinets	Moose Jaw
Action Honda	Generators	Moose Jaw
Mr. Merv Macauley	Consulting Services	Moose Jaw
Comfort Inn	Hotel	Moose Jaw
Andy's Transmission Ltd	Vehicle Support	Moose Jaw
Pascoes Machine Works	Machine services	Moose Jaw
Perths	Cleaning (coveralls)	Moose Jaw
Crystal Glass Canada	Glass	Moose Jaw
Sears	Miscellaneous	Moose Jaw
RSC Canada Ltd	rental of equipment	Moose Jaw
ATLAS Van Lines	Moving Services	Moose Jaw
Murray's Signs Ltd	Signs	Moose Jaw
Texas refinery Corp	Packaged POL	Moose Jaw
Johns Music Ltd	rental of equipment	Moose Jaw
Westrun Lumber	Lumber/supplies	Moose Jaw
Field Plumbing & Heating	Plumbing /Air conditioning	Moose Jaw
Clarks Supply & Services	Tool Rental	Moose Jaw
Cypress Paving	Paving Services	Moose Jaw
Great West Tire Exchange	Tires	Moose Jaw
Great West Auto Electric	vehicle support	Moose Jaw
Klassen Graphics	Signs	Moose Jaw
Polar Air & Auto	vehicle support	Moose Jaw
D & A Trophies & Gifts	Miscellaneous	Moose Jaw
Manda Custom sewing	Sewing Services	Moose Jaw
Simcoe Draperies	Draperies	Moose Jaw
Bohs Cycle & Sporting Goods	Bike/Bike support	Moose Jaw
Crackmasters/Scorpion	Vehicle Support	Moose Jaw
Letchers Auto Electric	Vehicle Support	Moose Jaw
Heartland Agro Services	Packaged POL	Moose Jaw
Five Star Steel	Metal	Moose Jaw
Home Building Centre	Lumber/supplies	Moose Jaw
Kal Tire	Vehicle/vehicle support	Moose Jaw
Cardinal Construction	Construction	Moose Jaw
EECOL Electric	Vehicle support	Moose Jaw
Emerald Glass & Gallery	Glass/Framing	Moose Jaw
Steve Wright Sign & Graphics	Signs	Moose Jaw
Castle Building centre	Lumber/supplies	Moose Jaw
Mac Tools	Tools	Moose Jaw
Prairie Fire Protection Ltd	Fire Extinguishers	Moose Jaw
Shoreline signs West	Signs	Moose Jaw
Heartland Medical & Protective	Safety products	Moose Jaw
MD Woodworks	Carpentry Services	Moose Jaw
Young's Equipment Inc	Hardware	Moose Jaw

Company	Service	City
Zellers	Miscellaneous	Moose Jaw
Purified Water Store	Ground search	Prince Albert
Ed's Scuba Services	Ground Search	Prince Albert
Digital Print Centre	Printing Services	Regina
Prairie Flying Services	Aircraft parts	Regina
Saskatchewan Roughriders	Social Event Tickets	Regina
Regina tent and Awning	Canvas	Regina
Inland Audio Visual	Electronics	Regina
Planes Esso	Packaged POL products	Regina
Envirotech	Plants and Plant Care	Regina
SaskTel CMR	Telephone Services	Regina
SaskPower	Power Services- Electrical	Regina
A Perfect Stitch	Sewing machines	Regina
Perry Macs Tools	Tools	Regina
Johnson Equipment	Warehouse equipment and supplies	Regina
Fastenal Canada Company	Hardware	Regina
Excalibur Industrial	Tools/Hardware	Regina
NEDCO	UPS, Electronics	Regina
Xerox Canada	Photocopiers	Regina
Marks Workwear House	Clothing	Regina
Grand & Toy	Stationary// Computer Supplies	Regina
Saskatchewan Chamber of Commerce	Membership Services	Regina
Shippers Supply	Warehouse and shipping supplies	Regina
AirLiquide	Gases /Oxygen delivery	Regina
Northgate Sewing Centre	Sewing machines & Support	Regina
Moore's	Uniforms/Clothing	Regina
State Services Group	Emergency Lighting	Regina
Crown Shred & Recycling	Document destruction	Regina
Mid North Safety	Safety Supplies	Regina
Regina Battery Depot	Batteries	Regina
Zep Manufacturing Co	Miscellaneous	Regina
Sommerville Safe and Lock	Locks & Keys	Regina
Pitney Bowes	Stamp Machine/Fax	Regina
ICG Propane	Propane	Regina
PBSC	Course Ware	Regina
Van Waters & Rogers Ltd	Chemicals	Regina
St Johns Ambulance	First Aid supplies	Regina
Strongco Rentals	Building rental	Regina
Acklands Grainger	Hardware/Tools	Regina
Century Vallen	Tools/Hardware	Regina
B&E Industrial	Tools/Hardware	Regina
M & M Equipment ltd	Hardware	Regina
Unisource Canada Inc	Miscellaneous	Regina
Avanti Office Supplies	set up & maintenance of furniture	Regina
A-1 Rent Alls	rental of equipment	Regina
AR Williams	TOW Tractor Repair/Support	Regina
Univar Canada Ltd	Chemicals	Regina

Company	Service	City
Book & Briar Patch	Books/Magazines	Regina
Spacerocraft Technologies	Hardware	Regina
Matrix Video communications	VCR Tapes	Regina
Cochrane engineering	Engineering Services	Regina
Goodall	Hardware	Regina
Safety Supply	Safety products	Regina
AMJ Campbell's Van Lines	Moving Services	Regina
Sunwest Sports & Marine	Ground search Vehicles	Regina
D & G Marine	Machine services	Regina
Shell Aero Centre	Packaged POL	Regina
Alton Tangedel Architect	Architect services	Regina
Surplus Plus Inc	Ground Search	Regina
GE Ground Engineering	Engineering Services	Regina
Shanahan's Sask	Lockers	Regina
Mecho Supply	Packaged POL	Regina
Advantage Sign & Display	Signs	Regina
A & B Sound	VCR Tapes	Regina
The Bolt Supply House	Hardware	Regina
Del Equipment	Barrell Loader	Regina
Hertz Rentals	Vehicle rentals	Regina
Cindercrete Products	Picnic Tables/Chairs	Regina
PCL-Maxam	Construction	Regina
Honeywell	Computer Support	Regina
Mr. Tool Warehouse	Tools	Regina
Windsor Plywood	Lumber/supplies	Regina
General Fasteners Ltd	Hardware	Regina
SIAST	Training	Regina
Westburne Electric Supply	Aircraft parts	Regina
Gescan	UPS	Regina
Information Services Corp	Charts/Maps	Regina
Pro Flight	Aircraft rental	Regina
Regina Diesel	Vehicle Support	Regina
Moore Industrial	Hardware	Regina
EMCO Limited	Ups	Regina
Krazy Kiley's	Camera & Support	Regina
Harnoi Leasing	Vehicle leasing	Regina
Tim Apperly	Consultant	Regina
National Business Machines	Office supplies	Regina
Regina Valve and Fitting	Hardware	Regina
Russell Food Equipment Ltd	Barbecue	Regina
Princess Auto	Vehicle Support	Regina
MacPherson Engineering Inc	Engineering services	Regina
Gould Home & Recreation centre	Miscellaneous	Regina
Daily Lennox	Plant Care	Regina
Brennan OP Office Supplies	Office Supplies	Regina
Superblinds & Draperies	Blinds	Regina
PLS Sign & Graphic	Signs	Regina
Paperworks	Office Supplies	Regina

Company

HOBO Express
Jetway Delivery Ltd
Jays Moving & Storage
Hypower
Audio warehouse
House of Tools
Federated Co-op
Northwest manufacturing
Zee Medical
Imaginit Saskatchewan
Omni Tech Systems Inc

Service

Deliveries
Deliveries
Moving Services
Hardware
Communication Equipment
Tools
Fuel
Stands/Furniture
Medical/Safety Supplies
Computer Programs
Security/ Security support

City

Regina
Regina
Regina
Regina
Regina
Saskatoon
Saskatoon
Saskatoon
Saskatoon
Saskatoon
Saskatoon
Saskatoon