

SOUTHERN ALBERTA AEROSPACE & DEFENCE STUDY: ECOSYSTEM MAPPING, COMPETITIVE BENCHMARKING & SECTOR STRATEGY

Reference Number: 2307-001

Issued: August 18, 2023

Responses Due: September 15, 2023

Calgary Economic Development Ltd.

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1. Introduction

Calgary Economic Development Ltd. (CED) invites qualified firms to submit a proposal for the **Southern Alberta Aerospace & Defence Study** RFP. A proposal, in electronic form must be submitted via email as outlined in Section 19. The proposal should be sent to the attention of the Contracting Manager by email as noted in Section 19. Late proposals will not be accepted.

2. Timeline

RFP Posted/Released	August 18 th , 2023
Deadline for Questions	September 8 th , 2023 – 17:00 MST
Proposal Submission Deadline	September 15 th , 2023 – 17:00 MST
Meetings with Short-listed Vendors	Completed by September 29 th , 2023
Bid Notification	October 5 th , 2023
Anticipated Project Kick-Off	October 12 th , 2023
Target Final Draft Report	February 29 th , 2024

Vendors are welcome to submit accelerated or more efficient timelines to complete the proposed work.

3. Definitions

“CED” means Calgary Economic Development Ltd.

“City of Calgary” refers to the municipal government of the City of Calgary.

“Request for Proposal” or “RFP” means this document including attached appendices.

“Project Lead” means the person identified in Section 15 of this RFP.

“Contracting Manager” means the person identified in Section 15 of this RFP.

“Vendor” means an organization responding to this RFP.

“Proposal” means a Vendor's response to this RFP and includes all the Vendor's attachments and presentation materials.

“Services” means the duties, tasks, and responsibilities of the Vendor as described in this RFP.

“Calgary Region” refers to the [Calgary Metropolitan Region](#).

“Southern Alberta” refers to the geographic area within Alberta south of and including Red Deer. This includes Calgary, Lethbridge, Medicine Hat, etc.

“A&D” means Aerospace and Defence.

“OEM” means Original Equipment Manufacture(r).

“MRO” means Maintenance, Repair, and Overhaul.

“Subsector” refers to a specific market vertical whose vendors (i.e., supply chain actors) focus on serving a specific audience and their needs for products and services. Examples could include, but are not limited to, UAVs, aerospace OEM, aerospace components and parts manufacturing, defence OEM, etc.

“Enabler” or “Enabling Factors” refers to a technology or capability that supports multiple verticals. Examples could include, but are not limited to, industrial 3D printing, materials science, automated production technology, advanced manufacturing, etc.

“UAV” means Unmanned Aerial Vehicle.

“IP” means intellectual property.

“R&D” means Research and Development.

“SME” means Subject Matter Expert.

“ESG” means Environmental, Social, and Governance.

“SAF” means Sustainable Aviation Fuel.

4. Standard Form Contract

By submitting a Proposal, a Vendor acknowledges it agrees that the terms and conditions of this RFP are incorporated by reference into its Proposal. If a Vendor's Proposal is accepted the Vendor will be expected to execute CED's standard contractor agreement. Vendors who are unwilling to abide by these standard terms and conditions should not submit a Proposal.

5. Vendor Questions

All questions regarding this RFP must be directed via **email** to the Project Lead **and** Contracting Manager listed in Section 15. Enquiries and responses may be recorded and may be distributed to all Vendors or posted on CED's website.

The Vendor must immediately notify the Project Lead and Contracting Manager in writing of any ambiguity, divergence, error, omission, oversight, or contradiction in

this RFP discovered by the Vendor and request whatever clarification is required to prepare the Vendor's Proposal.

In order for CED to deal effectively with Vendor questions or concerns about any terms, conditions or requirements of this RFP, including the standard terms and conditions, such questions or concerns must be communicated in writing to the Project Lead and Contracting Manager in accordance with the Timeline indicated in Section 2 above. Questions received after this time will be answered if, in the opinion of CED, the circumstances warrant and time permits.

6. Conflict of Interest

Vendors must fully disclose, in writing, to the Contracting Manager on or before the Proposal Submission Date of this RFP, the circumstances of any possible conflict of interest or what could be perceived as a possible conflict of interest then known to Vendor between the Vendor and CED and/or the Selection Committee. CED may reject any Proposal where, in the opinion of CED, the Vendor is or could be perceived to be in a conflict of interest.

7. Vendor Expenses

The Vendor is responsible for all costs of preparing and presenting its Proposal.

8. Confidentiality

All information provided by or obtained from CED in any form in connection with this RFP either before or after the issuance of this RFP, including any confidential information is the sole property of CED and must be treated as confidential; is not to be used for any purpose other than replying to this RFP and the performance of any subsequent contract; must not be disclosed without prior written authorization from CED; and must be returned by the Vendor to CED, or destroyed if held in electronic format, immediately upon the request of CED.

9. Background and Current Challenges

There were more than 500 companies in Alberta's A&D sector in 2019, employing over 40,000 people.¹ The YYC Calgary International Airport had 14.5 million passengers in 2022 and Alberta reported the third highest rate of use for drones.

¹ Alberta Aerospace and Defence Sector Analysis (Jul 2019)

CED has been instrumental in securing large investments for the Calgary Region from major A&D stakeholders (i.e., WestJet, DeHavilland)², demonstrating our ability to articulate the benefits of the region at a *high level*. We aim to improve CED's understanding of more granular factors like the unique strengths of our A&D subsectors and their potential growth trajectories. Appreciating the full capacity of the sector and developing growth strategies will require a thorough understanding of Southern Alberta stakeholders along the A&D value chain and establishing a baseline on how the Calgary Region's A&D ecosystem competes (and could compete) with other regions in key subsectors.

One of the most frequent questions CED receives from prospects related to A&D investment is of great relevance to this study: What are the unique attributes of the Calgary/Southern Alberta A&D sector that cannot (easily) be found in other jurisdictions/provinces? Through CED's experience positioning and pitching this sector on the world stage, it is evident that Southern Alberta's A&D ecosystem and its unique advantages are not adequately understood. As such, it is hindering the ability to quickly convert prospective opportunities as each project requires a longer discovery period.

The sector has a multifaceted supply chain and varying interpretations of how A&D subsectors are defined and intersect with each other. An additional layer of complexity is added by enabling factors, which support multiple subsectors and could be considered to elevate the sector as a whole. Advanced manufacturing is one such enabler and a key focus area for CED as its adoption continues to transform the A&D supply chain. Improvements in additive manufacturing, composite materials, AI, and cloud-based integrations are creating new avenues for aerospace manufacturers to innovate and design more quickly while saving on material costs. The extent to which these technologies are utilized in Southern Alberta has not yet been explored in sufficient depth.

Southern Alberta needs to explore the opportunity to buildout a nationally and globally competitive A&D industry supported by new and developing technologies, evolving our current strengths, and leveraging transformative investments to strategically fill critical gaps in our industrial supplier base.

10. Purpose of the Project

The purpose of this project is to uncover and validate economic opportunities related to the A&D sector in Southern Alberta with a focus on the Calgary Region. As part of this engagement, the successful vendor will help CED:

² [WestJet's](#) investment in aircraft capacity valued at more than \$7 billion with a strategy to double its capacity in Calgary before the end of the decade (announced Oct 2022) and [De Havilland Canada's](#) plan to bring 500 jobs to Calgary, as the firm manufactures firefighting planes (announced March 2022).

- Understand the Calgary Region's A&D supply chain breadth and assets.
- Communicate local market size and growth.
- Understand local market strengths and weaknesses.
- Compare the Calgary Region to other A&D hubs or centres of excellence.
- Identify investment opportunities which could include, but are not limited to, government or private funding of new and established companies, and investment by companies into setting up or expanding operations.
- Understand subsector strengths at a granular level with respect to specific companies and organizations, and at a high level with respect to supply chains.
- Establish priorities to catalyze significant and sustainable growth (especially for subsectors).
- Develop an action plan for next steps to realize investment potential in the short, medium, and long term.

The outcomes of this engagement will assist broader strategy for the creation of an A&D cluster in Southern Alberta and will demonstrate that the region has a 'right to win' both nationally and internationally to attract more people, companies, and capital. Southern Alberta's unique advantages in the A&D sector aren't well understood around the globe and the outcomes of this study will help inform the narrative used when pitching our region to prospective opportunities.

Findings extracted from this project will further strengthen CED's understanding of the industry and play an important role in directing future projects, advising clients of expansion opportunities, attracting additional A&D and adjacent businesses, and sharing timely information. CED believes this project will catalyze the momentum of establishing the region as a destination for A&D.

Additionally, CED seeks to understand the national impact of the Alberta A&D sector and how that will evolve over time (both naturally and with implementing strategies/recommendations identified during this engagement).

11. Key Objectives of the Project

Three key areas have been identified to progress economic opportunities related to A&D in Southern Alberta: (1) ecosystem mapping to understand value chain flow through key stakeholders, (2) benchmarking our competitive position in the A&D sector and subsectors, and (3) developing an A&D sector strategy and action plan.

Ecosystem Mapping



Create a custom and up-to-date inventory of A&D supply chain assets and other supporting stakeholder organizations localized in Southern Alberta (more granularity for the Calgary Region). Determine their key capabilities, responsibilities and where they connect to upstream and downstream supply chain actors.

Benchmarking



Identify jurisdictions that are A&D centres of excellence or hubs that will serve as the basis for benchmarking throughout this study. Compare nationally and internationally and include key enabling factors.

Document Southern Alberta's A&D sector and subsector position relative to identified jurisdictions using criteria and weighting developed by the vendor and aligned with CED.

Provide an estimate and breakdown on the potential market value captured by Southern Alberta's A&D subsectors through forecasts of market size and growth.

Identify subsectors in Southern Alberta with high growth potential and describe why. Demonstrate strengths and possible detractors.

Sector Strategy & Action Plan



Conduct further exploration into the UAV subsector and two additional subsectors with high growth potential (as identified by the vendor). What do stakeholders in Southern Alberta and CED need to do to ensure these subsectors grow, thrive, and attract investment? Perform a SWOT analysis of these subsectors which incorporates the influence of various enabling factors and trends. What are their competitive strengths/advantages in Southern Alberta? And what's required to maintain their competitiveness?

Uncover key contributors that speak to Southern Alberta's primary attractors and value proposition components relative to other jurisdictions that make our location a choice for aerospace investment in the identified subsectors.

What strategies can be implemented to maximize the growth of these subsectors? Are these recommendations transferable to additional subsectors?

Establish priorities and next steps for implementation to realize investment potential in short, medium, and long terms (in years, as defined by selected consultant) for subsector categories that have the necessary components to flourish in Southern Alberta.

12. Detailed Deliverables

The vendor will work with CED to finalize the scope of work, but the following are expected to be part of the proposal as well as accompanying rationale for the order (whether simultaneous or stepwise) through which the deliverables will be completed.

Establishing Context



- Forecast A&D sector growth at the global level over an agreed-upon time horizon (in years) and assess its degree of accuracy.
- Estimate the current market size of A&D in Alberta, forecast its growth, and make comparisons at two different levels.
 - (1) Whole province of Alberta compared to other Canadian provinces.
 - Estimate the contribution of Southern Alberta to the provincial aggregate.
 - What is the percentage change in Alberta's national share over the selected time horizon?
 - (2) Calgary Region compared to other Canadian metropolitan areas.

Regional Supply Chain Analysis



- Create a detailed inventory of A&D supply chain assets located in the Calgary Region and in Southern Alberta which could include, but need not be limited to, Red Deer, Medicine Hat, and Lethbridge.³
 - The inventory should include any actor located in the aforementioned geographic regions and is a part of the A&D supply chain, regardless of where along the supply chain the actor operates. Where relevant, include Tier 1-4 suppliers/manufacturers,⁴ peripheral support organizations, OEMs, MRO providers, major regional and national product users, and associated organizations that provide R&D, software, and transport of goods.
 - Allow for sorting to focus on specific A&D subsectors.
 - Assess their key capabilities and areas where they conduct the most activity/provide the most value.
 - Demonstrate the flow of resources amongst actors and highlight any interconnected relationships of interest within the region.
- Using the inventory as a starting point, highlight connections from supply chain actors in Southern Alberta to directly upstream and downstream actors⁵ which could be located outside Southern Alberta.
 - Key question: For those A&D companies and organizations considering expanding in or moving to Southern Alberta, which supply chain actors would provide them with critical inputs and which actors would buy their products?

³ No further north than Red Deer.

⁴ Tier 4 is the furthest upstream adjacent to raw materials suppliers; Tier 1 is furthest downstream adjacent to OEMs.

⁵ Refers to primary suppliers one level upstream and primary buyers (i.e., primary sales) one level downstream.

Comparative Jurisdictions Selection



- Identify jurisdictions that are A&D centres of excellence or hubs that will serve as the basis for benchmarking throughout this study. Comparator regions should be a mix of national and international locations.
 - Share a list with CED in the early stages or as part of RFP submission for alignment and feedback.
 - Provide rationale for why each location should be compared to Southern Alberta.

A&D Subsector Benchmarking



- Clearly divide the A&D sector into subsectors and provide accompanying rationale for categorization.⁶ Vendors are welcome to propose different criteria/models for determining subsector groupings provided rationale is clear, concise, and sound.
- Build a set of criteria that will be used to compare and score the chosen subsectors in Southern Alberta to those in identified competing jurisdictions. Share criteria and methodology for scoring in early stages with CED for feedback on attributes, units of measurement, and weighting. This set could include factors associated with, but not limited to:
 - Market size and forecasted growth in dollars (must have)
 - Cost-based strengths and incentives⁷
 - Ease of doing business
 - Policy and regulatory environment
 - Risks to operations
 - R&D
 - Subsector maturity/capacity⁸
 - Investment activity
 - Support programs
 - Number of major and high-growth (potential) companies
 - Determined by a set of key characteristics which must be met for companies to be considered major and/or high-growth.
- This analysis should identify which subsectors in Southern Alberta have critical mass and reasons as to why, especially when compared to competing jurisdictions.

⁶ Subsectors must be differentiated from enabling factors (please see glossary).

⁷ Funding or otherwise originating from federal, provincial, or regional sources.

⁸ Describes the extent to which the inputs and relationships required for A&D companies and organizations to quickly become successful are readily available.

Strategizing in Right-to-Win Subsectors



- Conduct further analyses on UAVs and two other subsectors (scored highest in subsector benchmarking)
 - For each subsector, conduct a SWOT analysis that incorporates the influence of (i) enabling factors which could include, but need not be limited to, advanced manufacturing, technology development, commercialization, and R&D, and (ii) other factors which could include, but are not limited to, investment opportunities, company expansions/attractions, policy and regulatory environment, capital sources, ESG innovation such as SAF, and any other proposals.
 - What gaps exist in these subsectors? How could/do they affect the competitive positioning of the subsector? How can CED, Calgary and Southern Alberta prepare to address identified opportunities and threats?
 - If applicable, how could/are advanced manufacturing techniques and technologies applied along the value chains of the selected subsectors?
 - If there are any segments of the associated supply chain(s) that have a higher density of assets than might be expected, provide details as to why and expand on any weaknesses.
 - Recommend strategies CED can use to attract FDI, nurture existing companies and grow the region's position as a global aerospace hub for the identified subsectors:
 - What do these subsectors require to expand their competitiveness vs. identified jurisdictions and in general?
 - Where is collective engagement important in realizing these strategies?
 - How could these strategies be applied in other relevant subsectors (identified in benchmarking)?

The study must also consider:

- Evolution of enablers and future assets that will contribute to the A&D value chain.
- Existing partnerships, those that have dissolved (and factors as to why), and those needed.
- Where applicable, the extent to which defence-related expenditures or programs by the Canadian government influence opportunities for the whole sector.
- All deliverables should be focused on the A&D sector for Southern Alberta but wherever possible should also include elaboration on how the deliverable applies to the Calgary Region. While we seek to understand the sector across Southern Alberta, it will be important to know about regional strengths to action any recommendations.

Any presentation of deliverables should be in electronic format and readable using common software and common formats such as Word, PowerPoint, Excel or PDF. Due to the importance of sharing interim insights from the research associated with this RFP, please plan for frequent touchpoints with CED and other advisors (refer to Section 13 for more info on communication).

13. Communication Cadence

Regular touchpoints with Project Lead and Contracting Manager (both from CED) and other designated SMEs on an Advisory Committee are to be expected.

- The chosen vendor should plan for **bi-weekly touchpoints** with the Project Lead and Contracting Manager as a minimum (unless otherwise agreed upon)
- The chosen vendor should consult the Advisory Committee monthly between project kick-off and targeted report delivery. Touchpoints should be scheduled around key milestones. The SMEs on the Advisory Committee consent to receiving direct correspondence from the vendor team where additional information/clarification is needed.
 - The Advisory Committee will be comprised of several SMEs from industry and academia.
 - Although communication with the Advisory Committee is mandatory, we encourage the chosen vendor to collaborate with other SMEs, and where relevant, engage those SMEs in formal touchpoints with the Advisory Committee.

14. Fees and Payment Terms

CED expects vendors to price the work according to the objectives and deliverables outlined in Section 11 and 12 as competitively as possible up to a maximum of \$110,000 CAD.

Proposals must provide full pricing disclosure and include a breakdown of the Vendor's fees and disbursements to complete all deliverables outlined in Section 12 and achieve the objectives listed in Section 11. Please include the following with the breakdown of costs:

- Cost per deliverable, including consulting fees, implementation fees and technology/platform recommendation fee estimates (monthly, annual, variable or contract term, if applicable).
- Prices must be stated in actual dollars and cents expressed in Canadian currency and inclusive of all taxes except for GST, which should be itemized separately.

Please provide options for the project team to reduce project costs and be prepared to consider which aspects of the proposal might be optional.

15. Project Lead and Contracting Manager

For the purposes of the provisions of information surrounding this contract or the administration of the contract, the **Project Lead** is:

Calgary Economic Development Ltd.
Attention: Amy Smith – Business Development Manager, Aerospace &
Logistics
237 – 4th Avenue SW, Suite 2600
Calgary, AB T2P 3K4
Canada
Email: asmith@calgaryeconomicdevelopment.com

For the purposes of the provisions of information surrounding this contract or the administration of the contract, the **Contracting Manager** is:

Calgary Economic Development Ltd.
Attention: Jacoby Holder – Specialist, Competitive Intelligence
237 – 4th Avenue SW, Suite 2600
Calgary, AB T2P 3K4
Canada
Email: jholder@calgaryeconomicdevelopment.com

16. Evaluation Metrics and Criteria

CED will evaluate submissions based on the following criteria:

Criteria	Possible Points
Quality of Submission <ul style="list-style-type: none"> • Clear and concise • Quality of writing 	10
Team Competency, Capabilities and Background <ul style="list-style-type: none"> • Relevancy of past projects (please provide examples where possible) • Experience with A&D sector and connections to key A&D stakeholders as demonstrated by past projects • Demonstrated business and/or supply chain development experience 	30
Approach and Proposal <ul style="list-style-type: none"> • Accurately addresses purpose and objectives • Clearly outlines approach to each deliverable; the methodology should also include consultations and timely reporting to the Contracting Manager and Project Lead • Sound rationale for order of deliverables • Initial delivery within timelines outlined by CED • Clear timelines for project milestones including, <ul style="list-style-type: none"> ○ Ecosystem Map ○ Competitive Benchmarking ○ Right-to-Win Subsector Strategy 	40
Fees <ul style="list-style-type: none"> • Fees have been clearly outlined and are competitive • Breakdown of fees and disbursements 	20
Total	100

A complete proposal should also include:

- A narrative of the proposed approach, reflecting the vendor's understanding of the scope, objectives, priorities, and requirements presented in this RFP.
- A work plan including major tasks, resource allocations, milestone sequencing, deliverables, dependencies, and start and end dates.
- Strategies that the vendor will apply to manage project resources and performance.
- Rationale behind the vendor's proposed methodology to providing the deliverables.
- An identification of risks applicable to the services, and proposed strategies to mitigate such risks.
- Any value-added services that the vendor offers to CED.

17. Preferences

The final report must provide insights sufficiently beyond the current body of research which includes, but is not limited to, the sources in Section 23. CED prefers research that is conducted with an appreciation of its **use cases**, of which being a tool for business expansion, retention, and attraction is the most important for this project.

18. Equity, Diversity and Inclusion (EDI)

Calgary Economic Development celebrates diversity and is committed to advancing Equity, Diversity and Inclusion (EDI). Through EDI, we create a path to success for all our employees, where they have equal opportunity for advancement, have the voice to contribute to our collective growth and development and work in an inclusive environment.

In alignment with our EDI guidelines, CED is also committed to maintaining a diverse supplier base and building relationships with vendors that reflect the market, clients and communities we serve.

As a possible vendor and partner of CED, we invite you to optionally include information and data about your organization's commitments to EDI as part of your submission.

19. Submission Information

Proposals must be received by **email** before **September 15th, 2023 at 5:00 PM MST** (per Section 2) to:

Attention: Jacoby Holder
Email: jholder@calgaryeconomicdevelopment.com
Subject: RFP 2307-001 – A&D Study

Receipt of proposals will be confirmed via an email reply from the Contracting Manager to each respective vendor.

- After the Proposal Submission Date, CED may post the identity and addresses of the Vendors.
- CED may elect to not consider any proposal that:
 - Is received after the exact time and date noted above.
 - Does not indicate the request for proposal's title, closing date and Vendor's name on the proposal in response to the RFP.
 - Is delivered to an address other than that provided above.

- Transmitted proposals will be accepted if the proposal is received before the submission deadline to the email address provided above.

20. CED Reservation of Rights

CED reserves the right:

- To not consider, or to reject, any or all Proposals in whole or in part for any reason whatsoever in its sole and absolute discretion;
- To accept any proposal in whole or in part, even if it does not comply with the terms of this RFP or is not the highest rated proposal in accordance with the evaluation criteria;
- To short list Vendors, and require a presentation by the Vendors short-listed and/or the provision of additional information by such short-listed Vendors;
- To, at any time, add, delete or modify this RFP and to have the Vendors advise CED of the effect of such changes on their Proposal and/or have the Vendors resubmit their Proposals in light of same;
- To negotiate at any time with any one or more of the Vendors to the exclusion of the other Vendors; and
- To not proceed, for any reason, with this RFP or the project contemplated in this RFP.

21. Intellectual Property

Unless otherwise agreed and confirmed in writing:

- a) All material, including but not limited to programs, reports, notes, maps, drawings, photographs, data, forms and other records prepared, created, written or recorded by ("**IP**"): (a) the Vendor, or (b) CED or (c) the Vendor and CED jointly, in connection with the Services under any agreement incorporating the terms and conditions of this RFP, a proposal, or as a deliverable under any agreement arising therefrom (an "**Agreement**"), will be the property of CED; accordingly, the Vendor hereby assigns to CED all rights, title and interest it may have from time to time in such material and all intellectual property rights therein will vest in CED.
- b) During the term of the relevant Agreement, the Vendor shall have a non-exclusive, non-transferable license to use such IP of CED or IP which is jointly created for the sole purpose of providing and completing the Services. Upon the termination or completion of a specific project or Agreement, the Vendor will promptly return such material to CED whether completed or not.

Notwithstanding the preceding sentence, the Vendor may retain for archival purposes a single copy of each item of such material; and

- c) Every invention, discovery or improvement developed by the Vendor in the course of, or in connection with, performing the Services under an Agreement where the invention, discovery or improvement has been initiated or directed or specifically requested by CED, will be the property of CED and, accordingly, the Vendor hereby assigns any intellectual property right to any such invention, discovery or improvement developed to CED. The Vendor will cooperate fully in the establishment and maintenance of all intellectual property rights accruing hereunder to CED. This provision will survive the termination of any Agreement and to the extent necessary or desirable, the Vendor will take such actions as are reasonably requested by CED after termination of an Agreement with respect to intellectual property rights created during the term of the Agreement.

The parties acknowledge and confirm that any intellectual property that was developed prior to the relevant Agreement, or that was developed by the Vendor independently from such Agreement with CED, or that was developed at the sole initiative of the Vendor without any prior initiation or direction or request from CED, will be outside the scope of this project.

22. No Further Contract or Liability Arising from RFP Process

By submitting a Proposal, the Vendor agrees and acknowledges that:

- Nothing in this RFP nor the submission of the Proposal nor the review and consideration of the Proposal by CED nor any communication between the parties in relation to the RFP or the Proposal will operate to obligate any party to enter into any further business relationship with the other party and, in particular, if CED decides to engage the Vendor in connection with any Proposal or the subject matter of the RFP then such engagement may only occur pursuant to a written agreement that has been signed by both parties and, absent such written agreement, CED will have no further liability or obligation to the Vendor in connection with the subject matter of the RFP;
- The Vendor is participating in this RFP process at its sole risk and expense, and CED will not be liable to the Vendor for any costs, expenses or liabilities incurred by the Vendor in any way arising in connection with the Vendor's participation;
- CED has made no representations other than those expressly stated in this RFP;
- CED has the right to cancel this RFP at any time, CED may reissue this or a similar request for Proposal at any time, for any reason whatsoever or decide

not to reissue it for any reason, without incurring any liability and no Vendor will have any claim against CED as a consequence; and

- The Proposal and any accompanying documentation submitted by the Vendor will become the property of CED and will not be returned.

23. Appendix

The following list of sources is strictly confidential. Vendors are not permitted to distribute these materials in part or in whole. Please access these sources [here](#).

1. Transportation & supply Chain Competitiveness Study (Aug 2016)
2. Alberta Aerospace and Defence Sector Analysis (Jul 2019)
3. Transportation & Logistics Value Proposition (Jan 2021)
4. Waypoint 2050 (second edition) (Sep 2021)
5. Reaching Cruising Altitude: A Plan for Sustainable Aviation Fuel (Apr 2022)
6. Agriculture and Aerospace and Defence Financial and Economic Analysis for Investment Attraction (Nov 2022)
7. 2022 Aerospace Manufacturing Attractiveness Rankings (Jan 2023)
8. Market Intelligence and Competitive Analysis – Aerospace (2023)
9. CED Aerospace Pitch Deck (Mar 2023)