GREATER TORONTO
MARKETING ALLIANCE

Invest in the Greater Toronto Area

Prepared for: AAGEF Ontario
Wednesday, May 29, 2013

Program Tonight

- GTMA – Who we are, services we provide
- GTMA FDI (Foreign Direct Investment) process
- Results - Total Investments to 2012
- 2013 - FDI Attraction Initiatives, Client Activity, Results to date
- GTMA Partners – public and private sectors
- 10 Reasons to invest in the GTA
- Key industries in the GTA
- Business relations between France and Canada

GTMA

Who we are
Services we provide

Greater Toronto Marketing Alliance (GTMA): Who we are

GREATER TORONTO
MARKETING ALLIANCE

Mandate: **To attract foreign direct investment into the Greater Toronto Area (GTA).**

29 municipalities, 35+ private sector companies - all in one place.

Public-private, non-profit corporation.

Staff of five to facilitate investor's needs.

24-member Board of Directors.

35-member Honourary Board.

The **single point of contact in the GTA** for foreign companies that are establishing their business in the region.

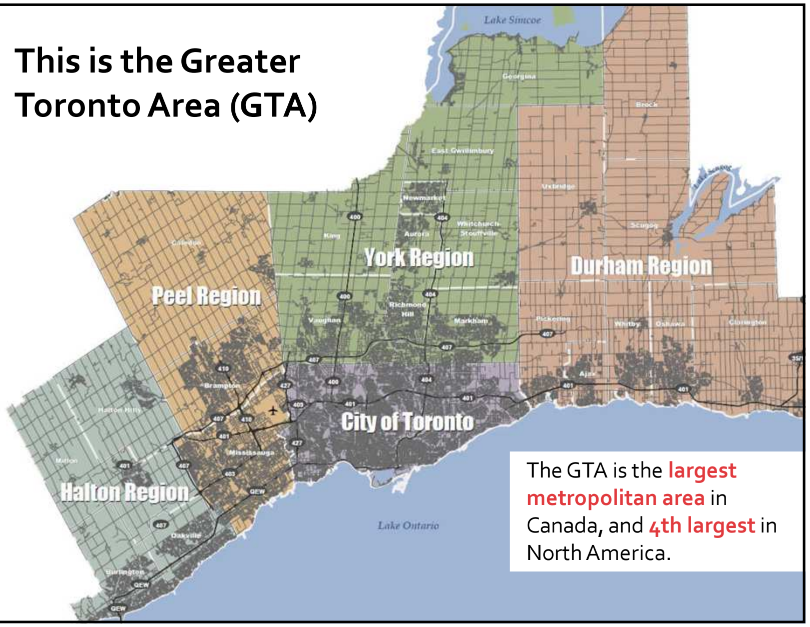
Provides economic, sectoral & community profile information.

Coordinates meeting itineraries and visitation programs.

Provides free & confidential advisory services.

www.greatertoronto.org

This is the Greater Toronto Area (GTA)



The GTA is the **largest metropolitan area** in Canada, and **4th largest** in North America.

GTMA

FDI (Foreign Direct Investment) process

GTMA FDI Attraction Process

1. Identify Key Markets & Sectors

•Develop intelligence to identify key sectors and markets with potential for FDI.

- Consult and obtain input from GTAEDP, DFAIT, MEDTE, OMAFRA, Private Sector Partners.

- Conduct research to identify key sectors & markets with potential for FDI.

- Carry out fact finding mission into a key target market to determine the potential for attracting FDI and the GTA value proposition.

2. Establish Business Development Channels

•Leverage in-market representative well connected to local business community to work with private sector partners to generate FDI attraction opportunities.
- Identify and approach key companies in the target sectors introducing them to the GTA value proposition.
- Identify key industry associations that can channel C-level executives to the GTA value proposition.

•Enhance relationships and work with federal and provincial government and representatives in key foreign markets to facilitate FDI inquiries.

•Partner with business development associations such as Ontario Technology Corridor (OTC) & Ontario Food Cluster (OFC).
- Leverage funding
- Intensify relationships with MEDTE, OMAFRA and DFAIT.

3. Generate Leads & Respond to Inquiries

GTMA FDI attraction is both proactive and reactive.

PROACTIVE	REACTIVE
•Develop intelligence to identify key sectors and markets with potential for FDI **•Generate leads in key markets & strategic business sectors** **•Build sales initiatives targeting key sectors & markets with value propositions that meet industry needs**	**•Respond to investment leads identified by:** **-Federal government offices** **-Provincial government offices** **-Private sector partners** **-Direct inquiries** **•Rely on reputation & ability to service clients** **-Response time is critical**

4. Client Servicing and Follow-ups

•When the potential investor visits the GTA or expresses strong interest in the GTA the GTMA with the help from private and public sector partners delivers client servicing that responds to the needs of the company.

- Advise on all aspects of doing business in the GTA
- Deliver economic, sector and community profile information
- Provide additional follow-up assistance as the potential investment moves forward.
- Support the public/private sector partners as they work to close the deal.

•Hand-off occurs when client decides on a location for their new facility.

5. FDI Attraction Activity Reporting

•Reporting on a quarterly basis

-Client activity report
-List of leads, prospects and new investments
-Status report on provincial government requests (RFIs)

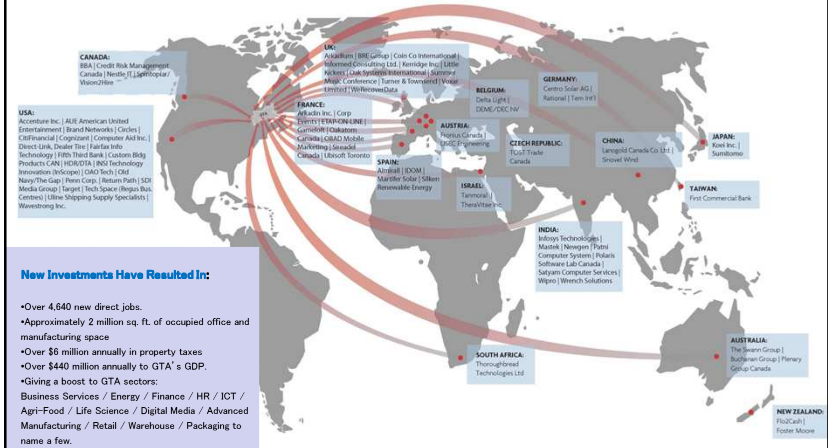
•Business development trip reports (delivered upon trip confirmation).

•ICT & Advanced Manufacturing company meetings held monthly to discuss programs, leads, prospects and follow ups.

Results

Total Investments up to 2012

To-date the Collaborative Efforts of the GTMA Partners Have Helped 100 Foreign Companies Start Operations in the GTA



New Investments Have Resulted In:

- •Over 4,640 new direct jobs.
- •Approximately 2 million sq. ft. of occupied office and manufacturing space
- •Over $6 million annually in property taxes
- •Over $440 million annually to GTA's GDP.
- •Giving a boost to GTA sectors:

Business Services / Energy / Finance / HR / ICT / Agri-Food / Life Science / Digital Media / Advanced Manufacturing / Retail / Warehouse / Packaging to name a few.

**Based on estimates given by the City of Toronto (2010): $3/sq ft and $95,000/employee*

2013

FDI Attraction Initiatives
Client Activity
Results to date

2013 FDI Attraction Initiatives

INITIATIVE	PARTNERS	SECTOR	ACTIVITY	LOCATION	DATE
Germany & France FDI Attraction	MEDTE / DFAIT	ICT	Mobile World Congress	Barcelona, Spain	Feb 25-28
Italy FDI Attraction	ICCO / MEDTE / DFAIT	ICT	Pre-qualified Meetings	Province of Rome/Milan/Torino/ Region of Veneto, Italy	March 18-27
Ontario Technology Corridor	OTC	ICT - Digital Media	2013 Game Developers Conference (GDC)	San Francisco and Los Angeles, USA	March 25 - 29
Italy FDI Attraction	ICCO / MEDTE / DFAIT	Agri-food & ICT	Incoming Delegation	Toronto	April
Ontario Food Cluster	OFC	Agri-food	SIAL TORONTO	Toronto	April 30-May 3
Brazil FDI Attraction	GTMA	ICT	Incoming Delegation (tbc)	GTA	May
Italy FDI Attraction	ICCO / MEDTE / DFAIT	Agri-food & ICT	Pre-qualified Meetings	Province of Rome/Milan/Torino, & Region of Veneto, Italy	June (tbc)
Ontario Food Cluster	OFC	Agri-food	SIAL Brazil	São Paulo, Brazil	June 25-28
Ontario Technology Corridor	OTC	ICT	2013 Gamescom	Cologne, Germany	Aug 21-25
California FDI Attraction	MEDTE / DFAIT	ICT	Pre-qualified Meetings	Los Angeles, California, USA	Sept
Ontario Technology Corridor	OTC	ICT	Pre-qualified Meetings	New York, USA	Sept (tbc)
Ontario Food Cluster	OFC	Agri-food	Market Development	Mid-West USA	Oct (tbc)
Italy FDI Attraction	ICCO / MEDTE / DFAIT	Agri-food & ICT	Pre-qualified Meetings	Province of Rome/Milan/Torino, & Region of Veneto, Italy	Oct (tbc)
Ontario Food Cluster	OFC	Agri-food	ANUGA 2013	Cologne, Germany	Oct 5-9
Germany & France FDI Attraction	MEDTE/DFAIT	ICT / Adv. Mfg	Pre-qualified Meetings	Germany & France	Oct 10-14
Brazil FDI Attraction	OMAFRA	ICT	Futurecom15	São Paulo, Rio de Janeiro, Curitiba, Brazil	Oct 21-24
Ontario Technology Corridor	OTC	ICT	Pre-qualified Meetings	São Paulo, Brazil	Oct 25-31
Ontario Technology Corridor	OTC	ICT	Game Connection	Paris, France	Nov (tbc)
Italy FDI Attraction	ICCO / MEDTE / DFAIT	Various	Incoming Delegation	Toronto	Nov (tbc)
Ontario Technology Corridor	OTC	ICT	Productronica	Munich, Germany	Nov 12-15

2013 Client Activity

	Q1	Q2	Q3	Q4	Total
Leads	101	-	-	-	101
Hot Leads	2	-	-	-	2
Prospects	5	-	-	-	5
New Investments	6	-	-	-	6

Leads are investment related inquiries generated from trade shows and conferences, business trips, pre-qualified lead generation programs or by direct contact through the web or as a referral.

Hot Leads are inquiries that have been followed up and a preliminary visit to the GTA and meeting with the GTMA has taken place.

Prospects are qualified investors that have visited the GTA and have received a substantial amount of direct servicing including meetings with representatives from the GTMA and its partners with the potential investor's key location decision-makers.

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GTMA 2013 New Investments

COMPANY	GTA LOCATION	SECTOR	ORIGIN	LEAD YEAR
Dekra	Toronto	Business Services - Automotive	Germany/USA	2007
Peer1 Network	Toronto	ICT – Co-location Datacenter	USA	2008
Ward & Burke	Mississauga	Construction	Ireland	2011
Forcare	TBD	ICT - healthcare	Netherlands	2012
CLIP Informatica	TBD	ICT – Mainframe Platform Solutions	Brazil	2012
Experientia	TBD	ICT – Design and Prototyping	Italy	2012

GTMA Partners

Public and Private Sectors

ECONOMIC MODELS in TORONTO:

How GTMA works with Government and industries

GTMA's Sales/Marketing Partners

GTMA's Current Partners

GREATER TORONTO MARKETING ALLIANCE

PRIVATE/ACADEMIC-SECTOR PARTNERS

GOLD LEVEL PARTNERS

DTZ
HermanMiller
Four Halls Inc.
METROLINX
KPMG
GE
THE IAN MARTIN GROUP
pwc

SILVER LEVEL
CISCO
Compass Creative Media
Enbridge Gas Distribution Inc.
Gowlings LaFleur Henderson LLP
Greater Toronto Airports Authority
INSIX Media
ITWorld Canada
Kilmer Group
Miller Thomson LLP
Ontario Power Generation
Scotiabank

BRONZE LEVEL
Fraser Milner Casgrain LLP
German Chamber of Industry and Commerce
Green and Spiegel Barristers & Solicitors
Italian Chamber of Commerce of Ontario
Procom
TSI International Group Inc.
VoiceMailTel Inc.

ENTREPRENEUR
Canada Competes
Global Link
Isabella Bertani Chartered Accountant
Rent2Pay

ON-LINE ALLIANCE
Lette LLP
ORION

EDUCATIONAL INSTITUTIONS
Centennial College of Applied Arts & Technology
Durham College
Humber Institute of Technology & Advanced Learning
McMaster University
Ontario College of Art & Design
Ryerson University
Seneca College of Applied Arts & Technology
University of Ontario Institute of Technology
University of Toronto
York University

PUBLIC-SECTOR PARTNERS

BRAMPTON Flower City
CALEDON
Canada
Halton
INVESTTORONTO
MISSISSAUGA
Ontario
York Region

Town of Ajax
Town of Aurora
Township of Brock
City of Burlington
Municipality of Claringtc
Town of East Gwillimbur
Town of Georgina
Town of Halton Hills
Township of King
City of Markham
Town of Milton
Town of Newmarket
Town of Oakville
City of Oshawa
City of Pickering
Town of Richmond Hill
Township of Scugog
City of Toronto
Township of Uxbridge
City of Vaughan
Town of Whitby
Town of Whitchurch-Stouffville

10 Reasons

To invest in the GTA

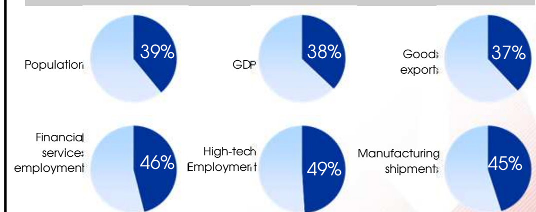
This is Ontario

• Canada/Ontario Overview

Ontario is Canada's **economic powerhouse.**

FDI projects relative to population	1st
Total number of FDI projects	2nd
Capital invested through FDI projects (within North America)	3rd

Ontario as a percentage of Canada



Mississauga, PEEL REGION

1 Economic Engine of Canada: Growing Market

• Top 10 Reasons to Invest

The GTA is projected to be the **fastest growing region** of Ontario.
GDP growth forecast for the GTA, 2012-2015: Average of **3.3%** and job growth average of **2.1%** annually.

Harbourfront WaveDeck, TORONTO

GDP Growth for the GTA:

- **2010:** Exceeded 4%
- **2011:** 3%

Construction Growth:

- The 2015 Pan Am Games, which will be held across the GTA, will require the construction of many venues.
- Sustained population growth will also fuel solid gains in new home construction.

SOURCE: GTA Economic Outlook, 2011 and Beyond

1 Economic Engine of Canada: Growing Market

• Top 10 Reasons to Invest

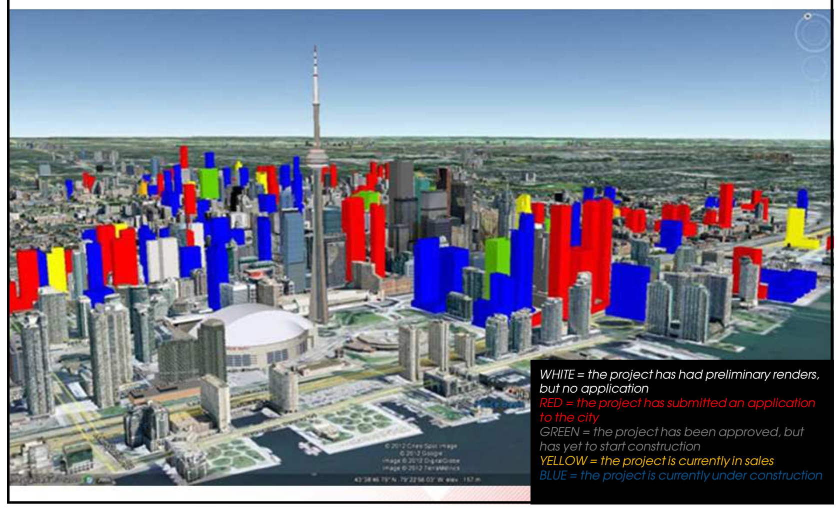
The GTA is projected to be the **fastest growing region** of Ontario.

The population of the GTA is forecasted to increase:

•From 6.1 million to 9.2 million by 2036.

•This will account for almost two-thirds of Ontario's net population growth.

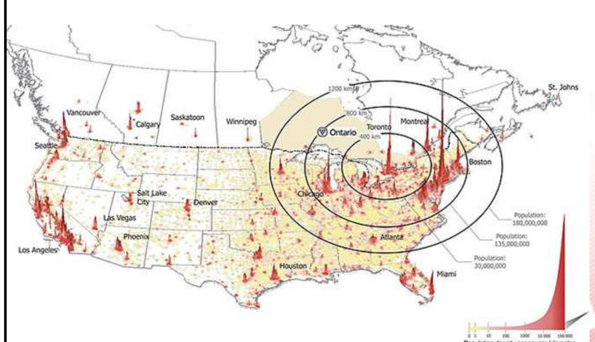
Toronto Skyline in 2020 - There are currently 147 skyscrapers and high-rises under construction in Canada's largest city.



2 Proximity and Access to Market

● Top 10 Reasons to Invest

Located within an 800 kilometre (500-mile) radius of **135 million people.**



Located within 90 minutes of:

- New York
- Chicago
- Boston
- Washington

Toronto's proximity to these markets makes the region an ideal place to headquarter North American operations.

3 Diverse Economy: Labour Force

● Top 10 Reasons to Invest

Toronto is home to **40%** of Canada's **corporate** headquarters.

The headquarters of 37 companies with over $600M in annual revenue are located in Toronto.

The GTA generates 20% of Canada's GDP with $323B.

Toronto has the 3rd most economic potential of all cities in the Americas *(fDi Intelligence (Financial Times)*

TOP 10 MAJOR CITIES ECONOMIC POTENTIAL

RANK	CITY	STATE	COUNTRY
1	New York	New York	US
2	São Paulo	São Paulo	Brazil
3	Toronto	Ontario	Canada
4	San Jose	California	US
5	Buenos Aires	Buenos Aires	Argentina
6	Montreal	Quebec	Canada
7	Mexico City	México	Mexico
8	Chicago	Illinois	US
9	Los Angeles	California	US
10	San Francisco	California	US

GTA North American Industry Rankings

Rank	Industry
2nd	Automotive
2nd	Food & Beverage
3rd	Financial Services
3rd	Film & Media
3rd	ICT
3rd	Design
3rd	Biotechnology

4 A Low-Risk Business Environment

● Top 10 Reasons to Invest

City with lowest risk in the world to recruit, employ, and relocate employees.

(Aon Consulting Global Research Centre, 2010)

The World Economic Forum has rated Canada's banking system as the soundest in the world for five years in a row.

With the lowest Net-Debt-to-GDP ratio in the G7, Canada's corporate taxes will remain competitive.

City of Pickering, DURHAM REGION

5 Cost Competitive – Corporate Tax Rates

● Top 10 Reasons to Invest

Competitive corporate income tax rates. (2)

	2010	2011	2012	2013
Provincial (Ontario)	12%	11.5%	**11.5%**	11.5%
Federal	18%	16.5%	**15%**	15%
Total	30%	28%	**26.5%**	26.5%

KPMG ranks Toronto 6th in business cost competitiveness in metropolitan regions worldwide with a population of over 2 million. (1)

Wonderland, Vaughan, YORK REGION

SOURCE: (1) 2010 KPMG Competitive Alternatives (2) Ontario & Canadian Budgets

6 World Class Education

● Top 10 Reasons to Invest

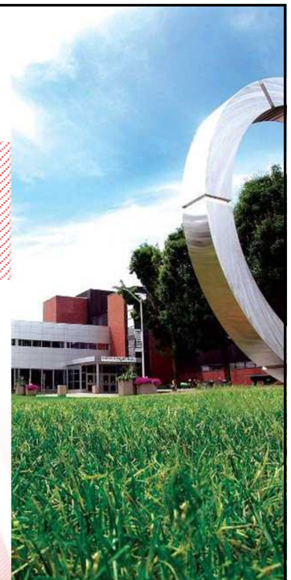
Most educated workforce in the G8 – 64% of the Ontario labour force aged 25-64 holds a post-secondary degree or equivalent.

Sample college/university-industry collaboration and partnerships:

Colleges Ontario Network for Industry Innovation (CONII)
- provides funding of $10 million through to 2013 for industry/college R&D.

Durham College & Beyond Covers Inc.
- Teams up to produce functional materials from Ply-me – the corporation's unique product developed from recycling various types of light film plastic .

UNIVERSITY of TORONTO · YORK UNIVERSITÉ UNIVERSITY · RYERSON UNIVERSITY · UOIT · GEORGE BROWN · DURHAM COLLEGE · CENTENNIAL COLLEGE · McMaster University · Seneca · HUMBER · Sheridan



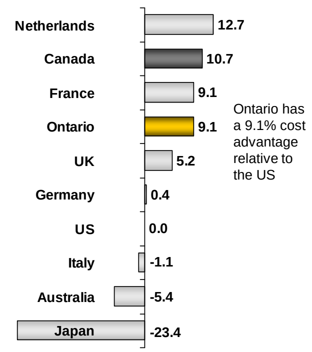
Durham College, DURHAM REGION

7 Leadership in Innovation: R & D Cost Advantages

● Top 10 Reasons to Invest

35% of all R&D conducted in Canada takes place in the GTA.

R&D Cost Advantage (%)



Source: MEDI analysis, prepared using CompetitiveAlternatives.com Cost Model, 2012 version, accessed on March 30, 2012.

After-Tax Cost of $100 R&D Expenditure, Small and Medium Sized Manufacturers, 2012

	R&D expenditure (general)	**R&D expenditure (at eligible Ontario research institutes)**
Gross expenditure	$100.00	$100.00
Actual after-tax expenditure	$51.57	$40.11

Note: data as of April 13, 2012.

Sources: Ontario Ministry of Finance and Canada Revenue Agency

8 Extensive Infrastructure

● Top 10 Reasons to Invest

- Toronto Pearson International Airport is **Canada's busiest airport**, processing over **45%** of Canada's air cargo.
- Billy Bishop Airport is located minutes from Toronto downtown core with over 15 Canadian and U.S. destinations

Public Transportation
- GO Transit
- Toronto Transit Commission (TTC)
- Brampton Transit
- Burlington Transit
- Durham Region Transit
- MiWay (Mississauga Transit)
- Oakville Transit
- Milton Transit
- York Region Transit and VIVA

Intermodal terminals
- CN Brampton
- CPR Vaughan

Highway system
- Extensive highway system connects the GTA to the North American market (400 series highways: 401, 403, 400, 404, 410, 407 ETR, and QEW).

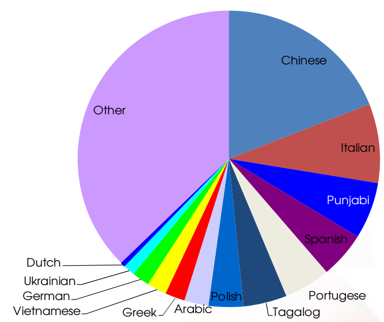
Other modes of transportation
- Toll roads
- Cycling routes
- Ferries

9 A Diverse, Multicultural Population

● Top 10 Reasons to Invest

One of the world's **most international cities**; 50% of population born outside of Canada.

Over 100 languages and dialects are spoken in the GTA



"Canada's foreign-born population is growing four times faster than its native-born segment, and more than four in every 10 new immigrants to Canada settle in the Toronto region.

South Asians and Chinese predominate the rising influx. Many immigrants are highly skilled, settle permanently and contribute quickly to the economy."

(PwC, Cities of Opportunity, 2009)

10 GTA Residential Real Estate

- Renting versus Buying

In 2011, the average price of a Canadian home is **$348,178**

To Buy:

Average Pricing Summary		
	416	**905**
Detached	$743,993	$530,129
Semi-Detached	$526,599	$377,456
Townhouse	$410,129	$340,957
Condo Apartment	360,892	272,103

To Rent:

Key Industries

In the GTA

KEY INDUSTRIES IN THE GTA: Food & Beverage Sector

DEVELOPMENT MODELS & FUTURE TRENDS

Food & Beverage – 2nd largest cluster in North America after Los Angeles:

- Sales for the Canadian **food retail** and **food service** industries were **$85** and **$61 billion** in 2010.
- The Agri-food sector is Ontario's **leading employer** with annual sales in excess of $34 billion.
- 700 businesses in Toronto
- 1,500 in the GTA (50% of Ontario)
- 60,000 employees
- Employment increased at a rate of 5%/year.
- Employment growth rates expected to double in the next 10 years

Reasons To Build Food Business in Ontario

- Easy access to more than 450 million North American consumers.
- Highly efficient transportation infrastructure delivering products from factory to market quick and convenient.
- Easy access to ingredients. More than 200 agricultural commodities are grown on Ontario's farms.
- Competitive and stable marketplace, top-ranked business climate with low energy prices, streamlined regulations and a low-risk investment climate.

KEY INDUSTRIES IN THE GTA: Aerospace and MRO

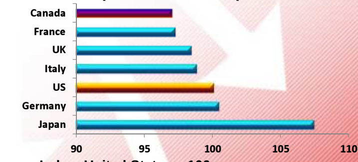
DEVELOPMENT MODELS & FUTURE TRENDS

Aerospace and MRO – 2nd largest cluster in Canada:
350 firms employing more than 20,000 people

- Annual sales: USD $6.5 billion
- Exports: 80% of total sales with 2/3 being exported to the U.S. and increasing penetration into Europe and Asia.
- Ontario's aerospace industry is known for producing turboprop and business aircraft, engines, landing gear, electronic systems, satellites and space robotics.
- Ontario is a member of the North American defense industrial base, enabling Ontario businesses access to U.S. military projects
- Major aerospace employers include: Bombardier Aerospace, Pratt & Whitney Canada, Magellan, UTC Aerospace Systems, Heroux-Devtek, Honeywell Canada, MDA and COM DEV.

Cluster	Tier 1	Tier 2	Tier 3	Tier 4
Aerostructures	1	13	34	21
Landing gear and Flight Control Actuation	4	10	19	17
Avionics & Flight Management	2	20	11	3
Turbine Engines	1	4	14	12
Environmental Conditioning & Electric Power	2	2	3	1
MRO	7	6	11	2

Canadian Aerospace Manufacturing Cost Advantage:
Aircraft Component Cost Compared to G7



Index: United States = 100

Source: KPMG Competitive Alternatives 2012 Edition

KEY INDUSTRIES IN THE GTA: Automotive

DEVELOPMENT MODELS & FUTURE TRENDS

In Canada, the GTA is the **#1 automotive cluster** servicing both domestic and international markets.

The GTA is the **2nd largest automotive cluster** in North America, after Detroit, MI.

- 12 major auto assembly plants operated by five of the world's top automakers.
- More than 300+ innovative parts manufacturers.
- 48% of Ontario's total vehicle production is based in the GTA.
- Close to 1.5 million in 2009, and more than 85% are exported to the U.S. ad 40+ countries.

Incentives offered by Ontario government
Automotive Innovation Fund: A $250 million supports strategic, large-scale R&D projects aimed at building more fuel-efficient vehicles.
Innovation Demonstration Fund: A $50 million fund that supports new technologies at the pilot or demonstration phase.

KEY INDUSTRIES IN THE GTA: Clean Energy & Environment

DEVELOPMENT MODELS & FUTURE TRENDS

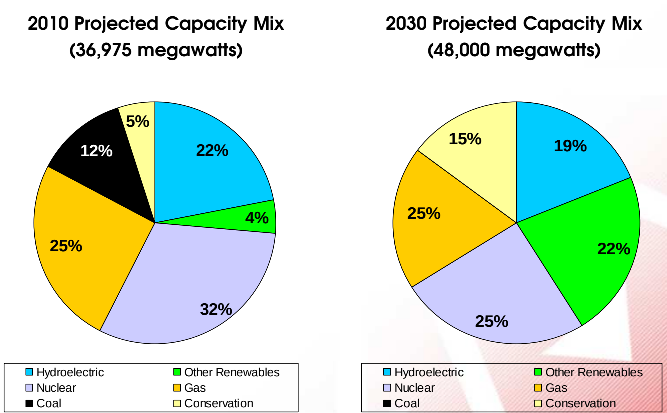
Ontario has **committed** to ensuring the long-term **availability of reliable energy** at **fair and stable cost.**

Ontario has made a commitment to renewable energy sources with a plan to shift away from fossil fuels.

- Phase out coal fired generation facilities by 2014.
- Generous incentive programs to promote renewable energy.

KEY INDUSTRIES IN THE GTA: **Clean Energy & Environment**

DEVELOPMENT MODELS & FUTURE TRENDS

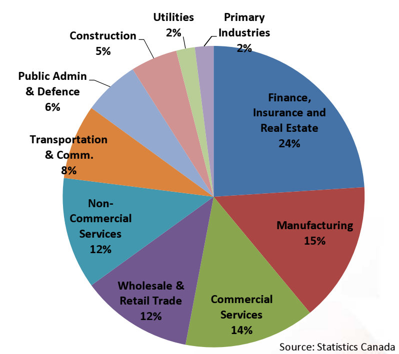


SOURCE: Ontario Long Term Energy Plan, 2010 – Proposed November 23, 2010

KEY INDUSTRIES IN THE GTA: **Financial Services**

DEVELOPMENT MODELS & FUTURE TRENDS

The **financial services sector was the greatest contributor** to Ontario's GDP in 2010.



Source: Statistics Canada

- GTA is the financial capital of Canada and the **3rd largest financial services** centre in the North America.
- Toronto is home to the **TSX (Toronto Stock Exchange)**, the Standard and Poor TSX Composite Index, and the TSX Venture Exchange. In 2010 the TSX had a market capitalization of over $2.3 trillion, and is the **third largest exchange** in North America.
- Canada's financial system is mature, sophisticated, and well-managed. Financial stability is underpinned by sound macroeconomic policies and strong, prudent regulation and supervision. **The five large banking groups** that form the core of the system are conservatively managed and highly profitable.

KEY INDUSTRIES IN THE GTA: Financial Services

DEVELOPMENT MODELS & FUTURE TRENDS

1 in 4 jobs in the GTA is in the financial services sector.

TOP 5 FIRMS LOCATED IN THE GTA			
Banks	Life Insurance	Legal	Accounting
RBC	Manulife Financial Corp.	Borden Ladner Gervais LLP	Deloitte & Touche LLP
TD	Sun Life Financial Inc.	Gowlings LLP	PwC LLP
Scotiabank	Intact Financial Corp	Fasken Martineau DuMoulin LLP	KPMG LLP
BMO	Aviva Canada	McCarthy Tétrault LLP	Ernst & Young LLP
CIBC	TD Insurance	Blake, Cassels & Graydon LLP	Grant Thornton

•More than 34,000 Chartered Accountants (CAs) and 14,000 certified management accountants.

•More than 7,000 Certified Financial Analysts (CFAs) and actuaries the 2nd highest concentration after New York.

•89% of foreign financial institutions operating in Canada are headquartered in the GTA (American Express, Citco, Goldman Sachs, ICICI Bank, ING Direct, Northern Trust, UBS)

SOURCE: Invest Ontario. BCG Report: Toronto CFA Society

KEY INDUSTRIES IN THE GTA: Life Sciences

DEVELOPMENT MODELS & FUTURE TRENDS

One of North America's largest biomedical sectors. Over 1,200 life sciences firms and $15 billion in revenues with $5 billion generated by exports .

The region's growing reputation for excellence in bio life sciences research has attracted major private and public R&D investment, including $1 billion from pharmaceutical companies for advanced drug development programs, and $347 million over five years from the Ontario government for the new Ontario Institute for Cancer Research (OICR).

KEY INDUSTRIES IN THE GTA: Life Sciences

DEVELOPMENT MODELS & FUTURE TRENDS

The Toronto Region is home to Canada's largest Life Sciences cluster. **Over 37,000** people are employed in the Life Sciences industry in the Toronto Region, compromising **30%** of the Canadian Life Sciences workforce.

Sample of Life Science companies in the GTA
Pfizer
Novartis
Sanofi Pasteur
GlaxoSmithKline
Astra Zeneca
Roche
Johnson & Johnson
GE Healthcare
Teva
Gamma-Dynacare

Li Ka Shing Knowledge Institute

Strong culture of collaboration

- Health Design Lab (St. Michael's hospital Li Ka Shing Knowledge Institute)
  - Create and customize media integrating health information access.
- Office of Research and Innovation (George Brown College, Ryerson, OCAD, St. Michael's hospital)
  - Develop interactive approaches for the health and wellness

KEY INDUSTRIES IN THE GTA: ICT

DEVELOPMENT MODELS & FUTURE TRENDS

The GTA employs around **one-third** of Canada's ICT labour force.

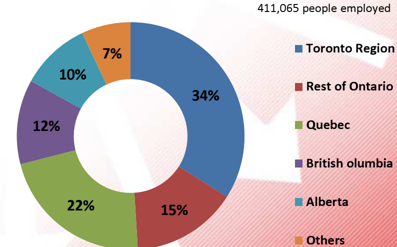
Top 25 Canadian ICT Multi-National Companies

- 9 of the top 10 Canadian ICT Multi-National's are based in the GTA.
- 19 of the top 25 ICT Multi-National's operating in Canada are located in the GTA.

Rank (2012)	Company
1	IBM
2	HP
3	Cisco
4	Microsoft
5	Oracle
6	Xerox
7	Honeywell
8	Wipro
9	SAP

Regional Distribution of ICT Labour Force in Canada

411,065 people employed



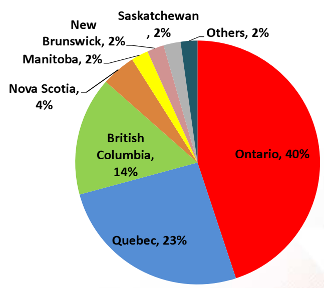
SOURCE: Branham 300, 2012 Edition

KEY INDUSTRIES IN THE GTA: Mobile Industry

DEVELOPMENT MODELS & FUTURE TRENDS

- Out of more than 1800 telecom companies in Canada, 40% are located in Ontario.
- Ontario/GTA is a centre of activity for mobile application development and it is expected to see continued growth over the next five years.
- The majority (over 70%) of mobile content, services, and applications companies in Ontario are located in the GTA.
- The Wall Street Journal cited Toronto as one of the world's biggest clusters of mobile application companies other than Silicon Valley.

Distribution of Telecommunication companies in Canada



KEY INDUSTRIES IN THE GTA: Interactive Digital Media

DEVELOPMENT MODELS & FUTURE TRENDS

Toronto is in the **top five cities for creative industries FDI,** after Los Angeles and New York.

Ontario's interactive digital media industry generates revenues in excess of $1 billion annually, with over 1,000 companies and 16,000 employees.

The Toronto Area is the centre of this industry in Ontario.

Toronto is in the top five cities for creative industries FDI, after Los Angeles and New York. The city's creative eco-system and vibrant artistic culture is showcased yearly through the Toronto International Film Festival showcases.

KEY INDUSTRIES IN THE GTA: Interactive Digital Media

DEVELOPMENT MODELS & FUTURE TRENDS

The GTA is the **3rd largest city region in film production** in North America.

Ontario **gaming industry has grown at a rate of 20%** and is forecasted to continue to grow at this rate.

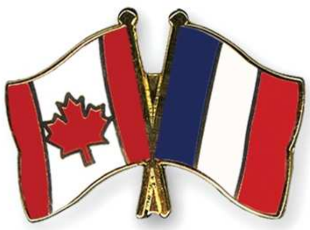
- The GTA is internationally renowned for its world class artists, designers, animators and programmers.
- The GTA has attracted global giants such as Ubisoft, Gameloft and Rockstar.
- 96 entertainment software companies in Ontario, majority are in the GTA (2011).

Business relations

Between France and Canada

Bilateral Relations

France/Canada Overview



Canada-France:
Building on the strength of their common history, bilateral relations between Canada and France are rich and dense at all levels and in numerous fields.

•This partnership is strengthened by numerous and regular high-level visits on both sides of the Atlantic including a constant exchange of information and ideas between Canadian and French parliamentarians notably through the Canada-France Interparliamentary Association.

•Canada and France also have the opportunity to highlight the strength of their bilateral relationship during the numerous commemorative ceremonies of the First and Second World Wars.

Regional Cooperation

A permanent member of the United Nations Security Council, of the North Atlantic Treaty Organization (NATO), of the G8 and G20, a founding nation of the European Union and lead partner in La Francophonie, France is a major international ally for Canada. France and Canada cooperate closely in foreign policy and have a common vision when it comes to international relations: a commitment to multilateralism, a focus on international security problems, promotion of democracy, human rights, good governance and development.

Bilateral Relations

France/Canada Overview

Entrance Hall, French Embassy, Ottawa

Trade Relations

Canada-France economic and trade relations are dynamic and diversified. They are characterized by sustained trade of high value-added products, good performance of trade in services and expanded partnership in the form of direct investment, strategic alliances, and scientific and technological partnerships.

Trade in Merchandise (2011)
•**Canada's import from France** totalled **$5.5** billion
•**Canada's export to France** totalled **$2.1** billion

Bilateral trade in service (2010) estimated at **$4.5** billion
•**Canada** is the third largest service trading partner in the world for France
•**France** is the third-ranked country of origin for international visitors to Canada

Academic Relations, Youth Mobility and Culture
France is the **5th** largest source country for foreign students to Canada (**1st** among European source countries)

Canadian-French Organizations in Ontario
•Assemblée de la francophonie de l'Ontario (AFO)
•Association des gestionnaires de l'éducation franco-ontarienne (AGEFO)
•Fédération nationale des conseils scolaires francophones (FNCSF)

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