



Canada's  
Technology  
Triangle



Where business is heading

Waterloo Region Cambridge Kitchener Waterloo

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

Canada's Technology Triangle:  
Waterloo Region, Cambridge, Kitchener and Waterloo  
*"Innovation Station ..."*

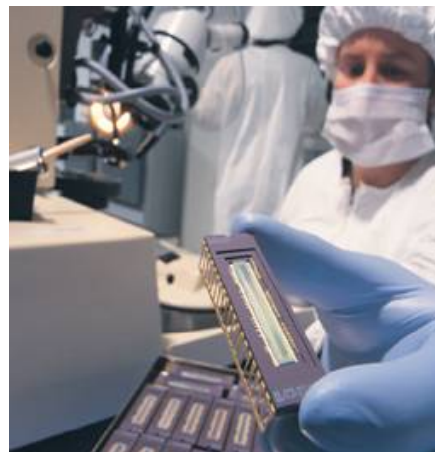
Presentation to REIN

By Catharine Gerhard - Business Development Officer

# Diverse. Innovative. Entrepreneurial.



Canada's Most  
Manufacturing-  
Intensive Metro  
Area



A  
Recognized  
High Tech  
Cluster



Business &  
Financial  
Services



An Emerging  
Life / Health  
Sciences  
Cluster



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# A Strategic Location



- ✦ Astride Hwy 401, Canada's Business Thoroughfare
- ✦ The Region of Waterloo International Airport served by Northwest Airlines
- ✦ 45 Minutes to Canada's Major International Airport, Pearson/Toronto
- ✦ Proximate to US/Canada Border Crossings (Windsor/Detroit, Niagara/Buffalo, Sarnia/Port Huron)
- ✦ 130 Million People within a Day's Drive
- ✦ A 100% Fibre-wired Community



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# Region of Waterloo International Airport



- ✈ International scheduled services through Northwest Airlines
- ✈ SunQuest and Signature Vacations flights
- ✈ WestJet scheduled service to Calgary
- ✈ \$27.5 M in Infrastructure Investment in 2002/03

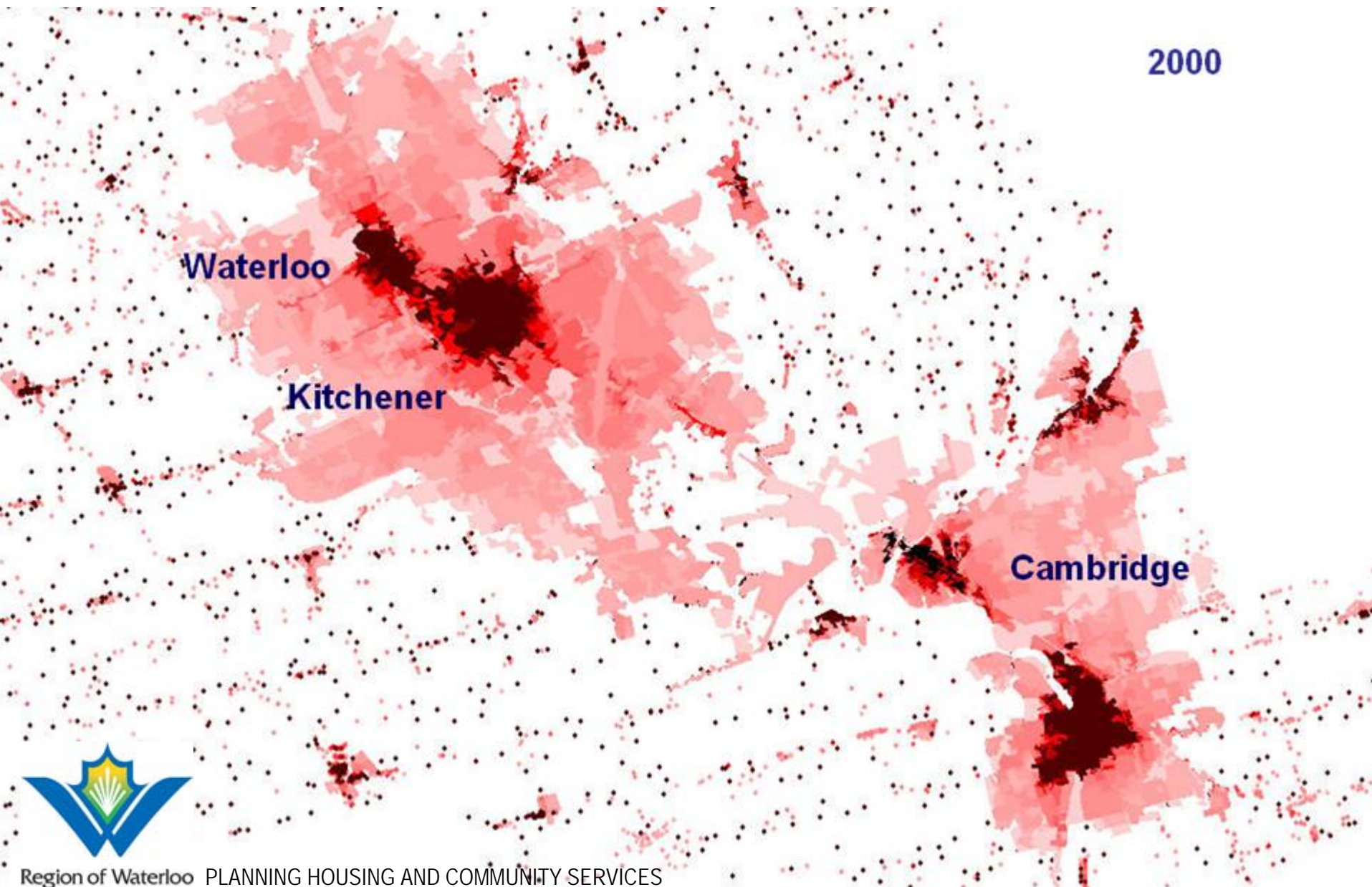


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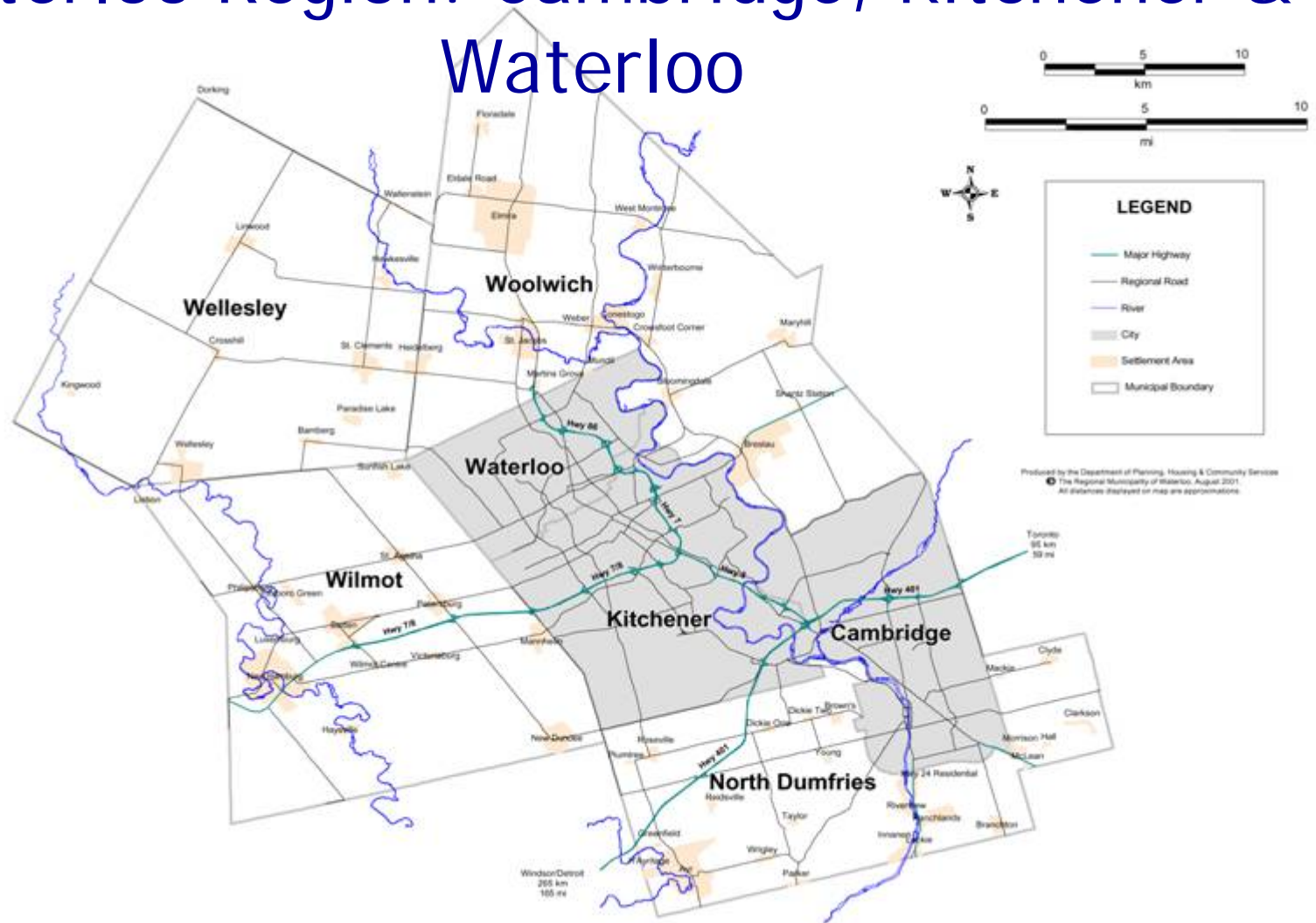


# How We've Grown So Far





# Waterloo Region: Cambridge, Kitchener & Waterloo



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## THE TOP 40 CITIES FOR BUSINESS

# Canadian Business

SEPTEMBER 29, 2008

## WHY MY TOWN IS TOPS

**HQ FOR RIM, JIM BALSILLIE AND OTHER TECH TITANS, KITCHENER-WATERLOO MAKES THE GRADE FOR 2008**

PAGE 64

**GUT CHECK: INSIDE THE TAINTED MEAT SCANDAL**

PAGE 87

**DON'T BE A FOOL—GO BACK TO SCHOOL**

PAGE 32

canadianbusiness.com

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CANADAS TECHNOLOGY CO  
CANADA'S TECHNOLOGY CO  
57 ERB ST W  
WATERLOO ON N2L 6C2

**PLUS**  
THE NEXT  
GREAT  
CANADIAN  
IDEAS P. 50

ELECTION PORK // RUSSIA ROULETTE

// REISMAN'S LESSONS

Canadian Business, September 2008



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# Outperforming the rest

Manufacturing job losses won't stall regional growth: BMO economist

By MICHAEL HAMMOND  
RECORD STAFF  
KITCHENER

Waterloo Region's economy is still on track to outperform the Canadian and Ontario economies in 2009, despite mounting manufacturing job losses, a Bank of Montreal economist says.

The potential loss of auto parts plant Kitchener Frame Ltd. will have a major impact, but it won't be enough to derail the economy, Douglas Porter, deputy chief economist of BMO Capital Markets, told a Kitchener audience yesterday. "I know there are concerns since those are high-quality, good-paying jobs," he told hundreds of business people at a breakfast meeting organized by Canada's Technology Triangle. "I wouldn't dismiss that. The point is this isn't a good thing, but the rest of the economy can still grow."

Porter made the comment one day after Kitchener Frame said it could close next year if it doesn't secure more work. The frame manufacturer employs 800 people. Another 400 laid-off workers are on union recall lists. Continuing job losses in the

### AUTO SHOCK

General Motors reports historic loss and offers buy-outs to 74,000 workers. See story page F4  
Plan to extend operations at Kitchener Frame until 2010 could buy time to secure more contracts. See story page F4

manufacturing sector mean the local economy will only grow by 1.5 per cent this year.

BMO predicts. However, strong growth in the tech sector, and the financial and the service industries will help the economy grow by 2.7 per cent beginning next year, which places the region ahead of the national and provincial forecasts. A number of laid-off workers have found work in the services industry, Porter said, which is keeping the region's unemployment rate at 5.5 per cent, below the national average. SEE ECONOMY, PAGE A6

The Record, May 30, 2008

## Region a 'cradle of innovation'



Waterloo Region sets an enviable example of economic growth, federal Industry Minister Jim Prentice told a business meeting last night.

By April Robinson, Record staff

WATERLOO—Waterloo Region is a "cradle of innovation," the federal industry minister told area business leaders last night.

"This is the region that not only creates innovative products, it creates innovative minds," Jim Prentice told the Conservative Business Association of Waterloo Region in a speech.

"This is Canada's cradle of innovation," he said, adding the Conservatives want to replicate this region's success across the country.

Speaking to a crowd that included Jim Balsillie, co-chief executive officer of Research in Motion, Kitchener-Waterloo MPP Elizabeth Wosneski and University of Waterloo president David Johnston, Prentice discussed how Canada is addressing economic challenges.

The knowledge economy of Waterloo Region will help pull the auto sector through tough times, he said. "I don't have confidence this audience that the automotive sector is knowledge-driven," he said, adding that he'll announce new funding next week that will help make the industry greener.

Rising gas prices pushing up transport costs, a rising Canadian dollar and a struggling U.S. economy are among today's challenges, he said.

Despite the success of universities, technology companies and think tanks like the Perimeter Institute, the region must remain competitive and strong, Prentice said.

"We have to be tough," he said. They'll encounter red tape as the Canada-U.S. border just once, while local parts cross the border several times before becoming a final product.

Prentice would also speculate whether Prime Minister Stephen Harper will shuffle his cabinet after the cabinet resignation of former foreign affairs minister Maxime Bernier this week.

"I don't even worry about those sorts of things. I just do what I'm supposed to do," he said in an interview before the speech.

Berry Kennedy, president of the business association, said the minister would do well anywhere in Harper's cabinet.

"He's certainly brought light to the Harper government," Kennedy said.

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The Record, January 10, 2008

## Local housing market sizzling

By ROSE SIMONE  
RECORD STAFF  
WATERLOO REGION

Homes were bought and sold at a record pace in Waterloo Region last year, defying all predictions of a slowdown in the housing market.

Across the region, 9,799 homes were sold in 2007, top-

SATURDAY, FEBRUARY 23, 2008

The Record.com

\$1.65 PLUS GST = \$1.73

# Region's economy unstoppable

Growth is expected to continue despite job losses in manufacturing

By MICHAEL HAMMOND  
RECORD STAFF  
WATERLOO REGION

It may seem difficult for thousands of laid-off workers to

believe, but Waterloo Region's economy is growing.

The Bank of Montreal is the latest organization to suggest this, despite a recent spate of

### PERSPECTIVES

An overview of the sciences and losses in our economic renewal

plant closings that have decimated the region's manufacturing sector, particularly the auto parts industry.

BMO, the Conference Board of Canada and the Royal Bank have all predicted the region will sport one of Canada's fastest growing economies beginning in 2009.

"It's definitely not a comfortable situation for those workers, but the region still has a low unemployment rate and a healthy

housing industry which is one of the most up-to-the-minute measures of the health of an economy," says Doug Porter, deputy chief economist for BMO Economics.

That's a small consolation to thousands of workers who have lost their jobs or face the prospect of their employer

closing. Earlier this month, Kitchener Frame's parent company said it plans to close the automobile frame manufacturing plant in 2010, due to slow sales of sport utility vehicles. It already has laid off 400 of its 1,200 workers.

CONTINUED ON PAGE A9





# A Compelling Story to Tell

## Globe and Mail

April 25-28, 2006

### *“The model for Canada’s economic future: Waterloo Region”*

“... it has relied on a century of change and innovation to produce one of Canada’s strongest economies. It’s a knowledge capital with a thriving entrepreneurial culture. It’s our future. If Canada is to prosper beyond the current commodities boom, we must learn from Waterloo’s success, or risk becoming a global economic backwater.”

Report on Business, April 25, 2006



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# A Compelling Story to Tell

Premier Dalton McGuinty

"This community is a hotbed of innovation. Whether you are talking about post-secondary institutions, research centres or business and high-tech sectors, this place has it."

At CIGI, October 21, 2005

Bill Gates

"Just in terms of scale and focus on computer science, Waterloo stands out . . ."

"There are many years when Waterloo is the university that has the most people (at MicroSoft) of any university in the world . . .  
Waterloo has always been in the top five every year."

At University of Waterloo, October 1, 2005

Paul Wells, "Back Page" Column, Maclean's

". . . this increasingly fascinating region . . ."

"I'll just say this: watch it go"

Macleans, October 19, 2005



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# Recent Headlines

- ❖ New directions for auto industry- Region may be well-positioned to pursue 'green' automotive technology
- ❖ German auto parts firm expands into Cambridge
- ❖ Region has national allure

## *Skilled workers attracted to this area, Conference Board of Canada report says*

Kitchener CMS is fourth in population density among Canadian cities, behind only Toronto, Montreal and Vancouver. The Conference Board gave the Kitchener census market area several top-five rankings, including third place for gross domestic product per capita, an indicator of wealth, behind Calgary and Edmonton. Waterloo Region also ranked fifth for productivity, fifth for employment rate and fifth for lowest crime rate. With its growing tech sector, the region ranked fifth for innovation. It was second only to Ottawa for the number of patents registered, with 28 patents per 100,000 people. The region ranked eighth for social health, which includes diversity, arts and culture and voter turnout.

December 11, 2007

- ❖ **Expedia.ca** Joins the List of Fortune 500 Company Clients for arvato Growth Brings New Jobs to Kitchener's Downtown



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# Demographic Benchmarks

- 507,000 people (Regional Municipality of Waterloo 2006)
- Population growth of 8.9% (2001-2006 StatsCan)
- Work force of 272,530 (2006 StatsCan)
- Net Inflow of 23,010 skilled and talented people (2001-2006 StatsCan)
- Immigrants comprise 22% of the population (2006 StatsCan)
- Countries of origin of immigrants shifting from UK, Portugal, Germany and Poland to India, China, Pakistan and Romania (2001-2006 StatsCan)
- 3<sup>rd</sup> youngest median age of major Canadian urban areas (2006 StatsCan)
- 6% unemployment rate



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# Diverse. Innovative. Entrepreneurial.



\$20.9 Billion GDP (2005)



Canada's Most Manufacturing Intensive Regional Economy (26% of work force)



Automotive



Advanced Manufacturing



Fabricated Metal Products



Electrical and Electronics



Food



Machinery



Plastics



Recognized High Technology Cluster



Information Technologies



Communications Technologies



Imaging/Photonics



Bio/Health Sciences



Medical Devices



Environmental



Insurance and Business Services



Emerging Life / Health Sciences



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# Internationally Oriented

-  \$12 Billion Goods Exported (2004)
-  Major Markets: US, UK, China, Germany and Japan
-  \$50,000 Product Exports Per Employee Compared to \$31,000 for Ontario (2004)
-  Waterloo Region Exports Greater Than Five Provinces
-  More Than 240 Foreign-Owned Firms
-  Major Sources of Foreign Investment: US, Germany, UK, France, Japan and The Netherlands



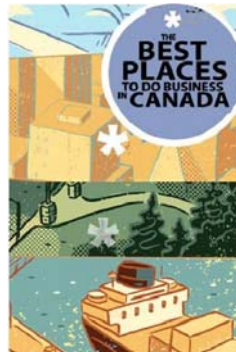
# Recent Investment News

- ✦ Toyota Motor Manufacturing Canada Expansion, Thomas Magnete,
- ✦ R&D Intensive - Google, McAfee, Nuvation, Gabae, Canterris
- ✦ CAPTEC, Oemeta, Preferred Sourcing, Rimowa
- ✦ CGI Group, Arvato (Bertlesmann), Marusa Marketing, CBCL Outsourcing, Regus
- ✦ KRUG Furniture Consolidation/Expansion (Kitchener)
- ✦ Archways and Mothers's Cookies Consolidation/Expansion (Kitchener)
- ✦ Nordia Expansion
- ✦ University of Waterloo Research + Technology Park
  - ✦ iAnywhere Solutions (a Sybase subsidiary)
  - ✦ Open Text
  - ✦ Accelerator Centre/Multi-tenant Building
  - ✦ Tech Town
- ✦ Municipal/Post-Secondary Partnerships
  - ✦ University of Waterloo School of Architecture, Downtown Cambridge
  - ✦ Wilfrid Laurier University (WLU) School of Social Work, Downtown Kitchener
  - ✦ UW Downtown Kitchener Health Sciences Campus (School of Pharmacy and Regional Medical Education Campus - Michael G. DeGroote School of Medicine)





## TOP 5 Small "North American Cities of the Future" 2007-2008



# Major Employers

## (Companies With 500+ Employees)

- ✦ Toyota Motor Manufacturing Canada
- ✦ Manulife Financial
- ✦ Sun Life Financial/Clarica
- ✦ Research In Motion
- ✦ ATS Automation Tooling Systems
- ✦ Schneider Foods
- ✦ Kitchener Frame (Martinrea)
- ✦ Home Hardware
- ✦ CBCL Outsourcing
- ✦ Rockwell Automation
- ✦ Challenger Motor Freight
- ✦ Babcock & Wilcox Canada
- ✦ Loblaws Distribution
- ✦ Arvato Services (Bertelsmann)
- ✦ MTD Products
- ✦ Canadian General-Tower
- ✦ Economical Insurance Group
- ✦ NCR Canada
- ✦ Lear Canada
- ✦ COM DEV International Ltd.
- ✦ Bend All Automotive Incorporated
- ✦ Kuntz Electroplating Inc.
- ✦ Krug Inc.
- ✦ Dare Foods Limited
- ✦ Rogers Communication
- ✦ Frito-Lay Canada
- ✦ BLM Transportation Group



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# A Few of the Region's Distinctive Products

Luxury SUVs



TMMC Toyota Motor  
Manufacturing Canada

Leading-Edge Handheld  
Wireless Technology



RIM Research In Motion



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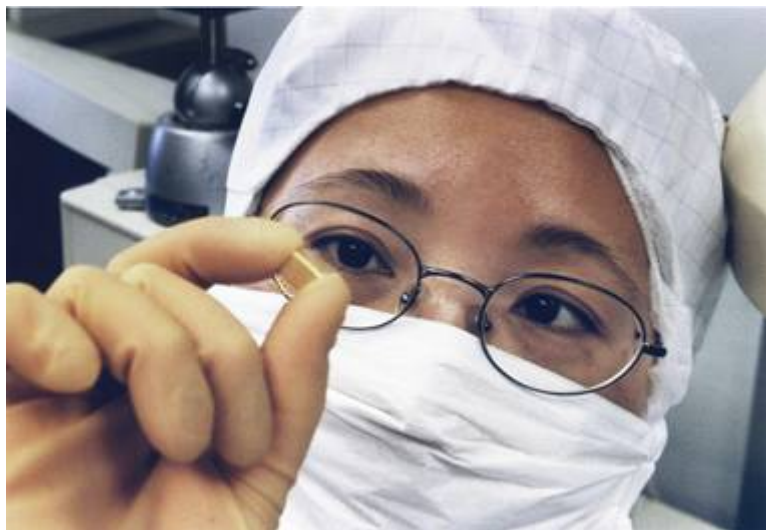
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# A Few of the Region's Distinctive Products

Components for Space  
Exploration



COM DEV International

Luxury Polycarbonate Luggage



Rimowa



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# A Few of the Region's Distinctive Products

Amphibious Vehicles



ODG Ontario Drive & Gear

Quality Delicatessen Meats



Schneiders Foods



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# A Few of the Region's Distinctive Products

High Resolution Digital  
Projectors (CP2000)



Christie

Contract Pharmaceutical  
Research



Orbus Pharma





# A Few of the Region's Distinctive Products

Biologicals for Agriculture



Stunningly Designed Office Furniture



EMD Crop Bio Science Canada  
(Merck KGaA)

Krug



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# A Few of the Region's Distinctive Products

Insurance



Manulife Financial

Components for Landing Gear



Héroux-Devtek



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# World Class Post-Secondary Education



University of Waterloo

Wilfrid Laurier University

Conestoga College Institute of Technology and Advanced Learning

Nearby University of Guelph











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# Outstanding Post-Secondary Education

Leaders in:

-  Cooperative Education
-  Mathematics
-  Computer Science
-  Engineering
-  Nanotechnology
-  Life Sciences
-  Environmental Sciences
-  Optometry

-  Entrepreneurship
-  Economics
-  Business
-  Architecture
-  Social Work
-  Music
-  Political Science
-  Actuarial Science

 50,000 Full-time Post-Secondary students

 Includes 14,000 co-operative education students



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# World Class Research



- Home to Think Tanks with Global Ambition:
  - Perimeter Institute for Theoretical Physics,
  - The Centre for International Governance Innovation (CIGI), and
  - The Academic Council on the United Nations System (ACUNS).

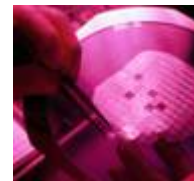
- 150 Research Centres
- \$277 Million in Private-Sector R&D (2002)



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# Regional Growth Management Strategy

Accommodating future growth



729,000 Population By 2031



Reinforcing Growth of City Cores



Rapid Transit Along Central Transit Corridor



Development Incentives



Brownfield Development



Maintaining Urban/Rural Boundaries



Conservation Reserves



130,000 New Jobs By 2031



Expansion of Employment Lands



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# Transportation Infrastructure



Integrated Grand  
River Transit and New  
iExpress Transit



Proposed Rapid Transit in Central  
Transportation Corridor





# Three Urban Core Areas



Downtown Cambridge



UpTown Waterloo



Downtown Kitchener



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# Innovative Revitalization Projects



Lang Tannery

The Barrelyards



## Regional Growth Management Strategy

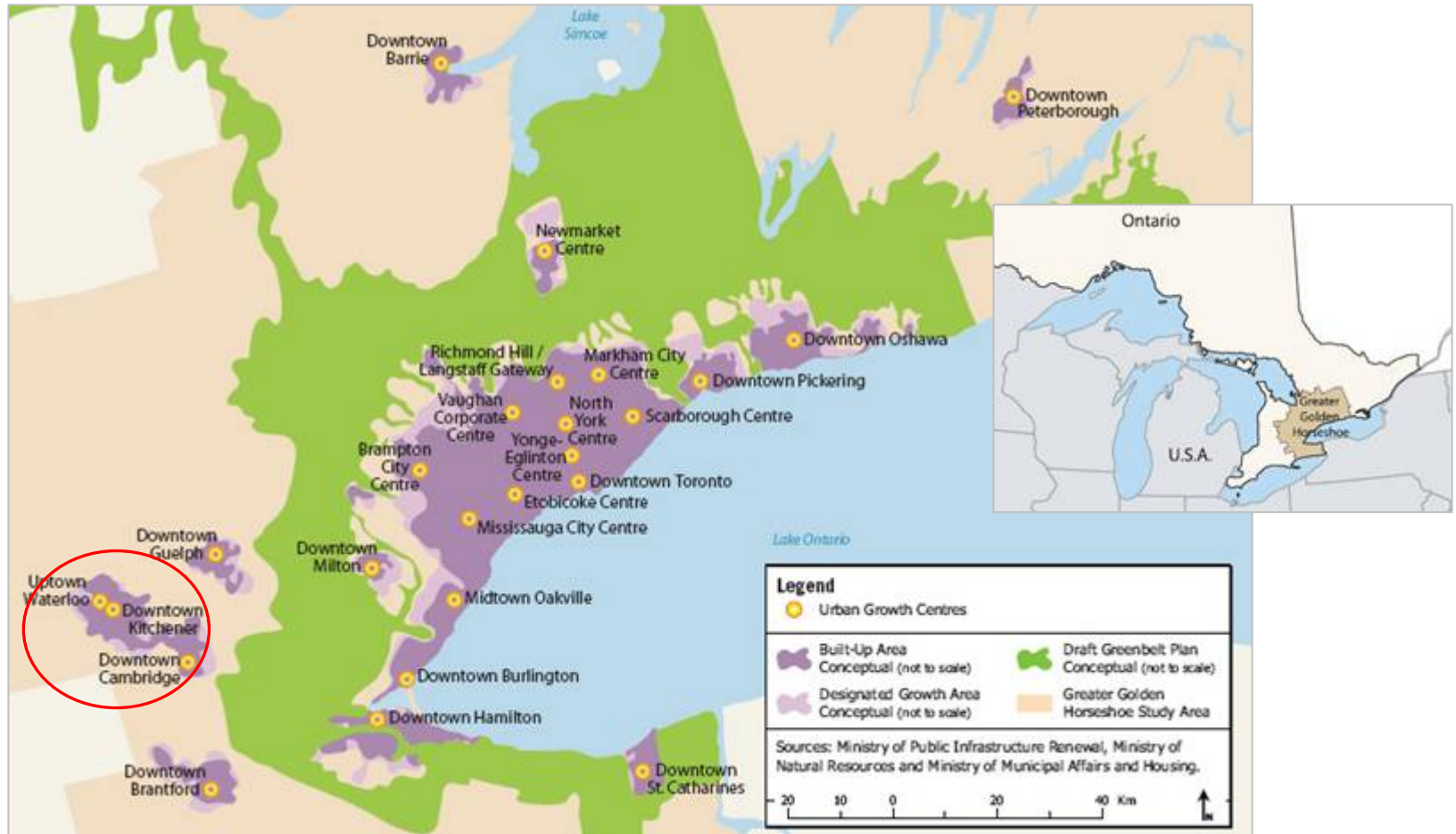


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# Ontario's "Places to Grow" Growth Plan for the Greater Golden Horseshoe



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# Telecommunications Infrastructure

- ❖ National Providers such as Bell Canada, Allstream & Rogers
- ❖ Full Cellular Capabilities (Digital/Analogue)
- ❖ Locally owned Atria Networks, sub of power utilities
- ❖ Fibre-optic Metro Ethernet to 1,000 Mbps
- ❖ Bandwidth from ISDN to OC-48 to Gig-E
- ❖ Fully Redundant
- ❖ Wireless Internet (Wi-Fi) Zones
- ❖ Waterloo Region Education & Public Network (WREPNet)  
Utilizes Atria to Connect 200 Public Sector Sites
- ❖ Commercially Available Server Fortress





# Neighborhoods for Every Taste



Multi-Residential  
Central  
Urban Options



New Two-Storey Homes



Established  
Residential  
Neighbourhoods



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# Kitchener-Waterloo Real Estate Board

Dec 31/08

## NUMBER OF UNITS SOLD (ALL CATEGORIES)

	YTD 08	YTD 07	%CHANGE 07/08
Total Residential Only	6,115	6,811	10.2-
Multi Family	189	246	23.2-

## UNITS SALES BY TYPE OF DWELLING (RESIDENTIAL ONLY)

	YTD 08	YTD 07	%CHANGE 07/08
Sgl Family-Detached	3,972	4,515	12.0-
Semi-Detached	507	618	18.0-
Freehold Townhouse	453	484	6.4-
Condominium Unit	1,123	1,131	0.7-



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# Kitchener-Waterloo Real Estate Board

Dec 31/08

## UNIT SALES -- RESALE AND NEW (RESIDENTIAL ONLY)

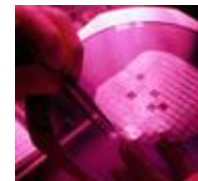
	YTD 08	YTD 07	%CHANGE 07/08
Resale Homes	5,553	6,108	9.1-
New Homes	562	703	20.1-
Total	6,115	6,811	10.2-



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# Kitchener-Waterloo Real Estate Board

Dec 31/08

## UNIT SALES BY PRICE CATEGORY (RESIDENTIAL ONLY)

		YTD 08	YTD 07	%CHANGE 07/08
Under	\$50,000	72	52	38.5
50,000	99,999	31	51	39.2-
100,000	124,999	130	240	45.8-
125,000	149,999	330	414	20.3-
150,000	174,999	393	492	20.1-
175,000	199,999	554	847	34.6-
200,000	224,999	828	1,084	23.6-
225,000	249,999	1,000	1,020	2.0-
250,000	274,999	750	690	8.7
275,000	299,999	484	474	2.1
300,000	349,999	599	607	1.3-
350,000	399,999	371	357	3.9
400,000	499,999	323	291	11.0
500,000	749,999	199	167	19.2
750,000	999,999	39	19	105.3
OVER	1,000,000	12	6	100.0
Total-Residential Only		6,115	6,811	10.2-



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# Kitchener-Waterloo Real Estate Board

Dec 31/08

## AVERAGE SALE PRICE (RESIDENTIAL ONLY - ALL AREAS)

	YTD 08	YTD 07	%CHANGE 07/08
Sgl Family-Detached	\$302,711	\$283,126	6.9
Semi-Detached	\$207,124	\$194,271	6.6
Freehold Townhouse	\$227,908	\$211,428	7.8
Condominium Unit	\$174,347	\$163,765	6.5
Total-All Categories	\$264,367	\$248,882	6.2
Link Home	\$218,486	\$200,552	8.9
Cottage / Recreational	\$170,954	\$143,740	18.9
Mobile Home	\$78,591	\$62,500	25.7



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# Kitchener-Waterloo Real Estate Board

Dec 31/08

## MEDIAN SALE PRICE (RESIDENTIAL ONLY - ALL AREAS)

	YTD 08	YTD 07	%CHANGE 07/08
Sgl Family-Detached	\$271,000	\$256,000	5.9
Semi-Detached	\$206,000	\$192,000	7.3
Freehold Townhouse	\$227,000	\$210,000	8.1
Condominium Unit	\$162,000	\$147,900	9.5
Total-All Categories	\$242,000	\$229,900	5.3
Link Home	\$220,000	\$204,750	7.4
Cottage / Recreational	\$165,000	\$147,000	12.2
Mobile Home	\$79,000	\$58,000	36.2



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# Kitchener-Waterloo Real Estate Board

Dec 31/08

## NEW LISTINGS PROCESSED

	YTD 08	YTD 07	%CHANGE 07/08
Sgl Family-Detached	7,059	6,730	4.9
Sgl Family-All Other	2,952	2,916	1.2
Total Residential Only	10,011	9,646	3.8
Multi Family	510	518	1.5-
Total - All Categories	12,321	11,797	4.4
Land	280	227	23.3
Commercial	1,428	1,312	8.8



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# Kitchener-Waterloo Real Estate Board

Dec 31/08

## NUMBER OF ACTIVE LISTINGS (END OF PERIOD)

	DEC 08	DEC 07	%CHANGE 07/08	NOV 08	%CHANGE NOV/DEC
Sgl Family-Detached	1,122	871	28.8	1,497	25.1-
Sgl Family-All other	440	360	22.2	536	17.9-
Total Residential Only	1,562	1,231	26.9	2,033	23.2-
Total - All Categories	2,400	1,985	20.9	3,078	22.0-



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# Strong Sense of Community

## Deep Traditions



Early German Settlement



Mennonite Traditions



Oktoberfest! 2nd Largest Bavarian Festival



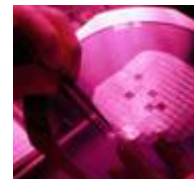
Many Other Cultural festivals



Farmers Markets



Scottish Roots



# Arts, Culture & Heritage

- Artists in Residence
- Cambridge Centre for the Arts
- Canadian Clay & Glass Gallery
- Castle Killbride
- Centre in the Square
- Centre for International Governance  
Innovation Lectures
- Center In The Square
- Doon Heritage Crossroads
- Elam Martin Farmstead
- Kitchener Industrial Artifacts
- Kitchener Waterloo Art Gallery
- Kitchener Waterloo Chamber Music  
Society
- The Grand Philharmonic Choir
- Kitchener Waterloo Symphony  
Orchestra
- Moorside: Mackenzie King Estate
- McDougall's Cottage Interpretive Centre
- Nearby Stratford Festival
- Opera Ontario: Kitchener Waterloo Opera
- Perimeter Institute Culture Club
- Perimeter Institute Public Lecture Series
- Registry Theatre
- Rotuna Gallery
- Steckle Farmstead
- St. Jacob's Country
- Theatre Athena
- Theatre Cambridge
- Joseph Schneider Haus Museum & Gallery
- Theatre & Company
- Homer Watson House & Gallery
- Waterloo Entertainment Centre
- Waterloo Regional Children's Museum



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# Festivals

- 🍁 Cambridge Grand Riverfest
- 🍁 Cambridge Fall Fair
- 🍁 The Cambridge Highland Games
- 🍁 Chriskindlmarkt
- 🍁 Drayton Festival
- 🍁 Elmira Maple Syrup Festival
- 🍁 Grand River Baroque Festival
- 🍁 Grand Christmas
- 🍁 Kitchener Blues Festival
- 🍁 Multicultural Festival
- 🍁 Mill Race Festival of Traditional Folk Music
- 🍁 Oktoberfest
- 🍁 Open Ears Festival
- 🍁 Uptown Waterloo Jazz Festival
- 🍁 Waterloo Buskers Festival
- 🍁 Waterloo Community Arts Festival
- 🍁 Waterloo County Quilt Festival
- 🍁 Wellesley Apple Butter and Cheese Festival








# Recreation

- ❖ A Heritage River: The Grand River
  - ❖ Grand River Trails
  - ❖ Canoeing & Rafting
  - ❖ Sport Fishing
- ❖ 6 Conservation Areas and Over 3,000 Acres of Parks
- ❖ More than 22 Golf Courses
- ❖ Nearby African Lion Safari
- ❖ Bingemans Park
- ❖ Chicopee Ski Resort
- ❖ RIM Park (Waterloo)
- ❖ Sports World
- ❖ The Kitchener Auditorium
- ❖ The Trans-Canada Trail
- ❖ Wings of Paradise Butterfly Conservatory
- ❖ Within 1½ hours of 3 Great Lakes



# What Defines the Waterloo Region Canada's Technology Triangle

-  Diverse. Innovative. Entrepreneurial.
-  A Growth Leader
-  Skilled and Educated Talent Pool
-  Cost Competitive
-  Internationally Oriented
-  Outstanding Post-Secondary Educational Institutions
-  Strategic Location
-  Rich Traditions and a Vibrant Lifestyle



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# Canada's Technology Triangle Inc

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