



Ottawa: Canada's Creative Economy Capital

Transitioning to a New Level



OCRI – Who are we?



Private Not-for-Profit Corporation

Partner with the City of Ottawa to deliver services on behalf of the City:

- Entrepreneurship Centre/Innovation
- Investment and Commercialization
- Global Marketing
- Technology Cluster Support (8 clusters)
- Talent Development/Education

Also represent 800 members with 110,000 employees (78,000 technology)

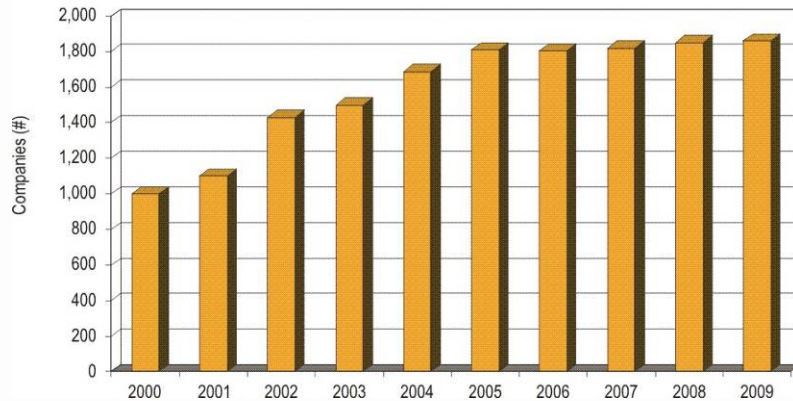
Support all business sectors from start-ups to multinational corporations

Promote Ottawa internationally, focusing on export-oriented businesses

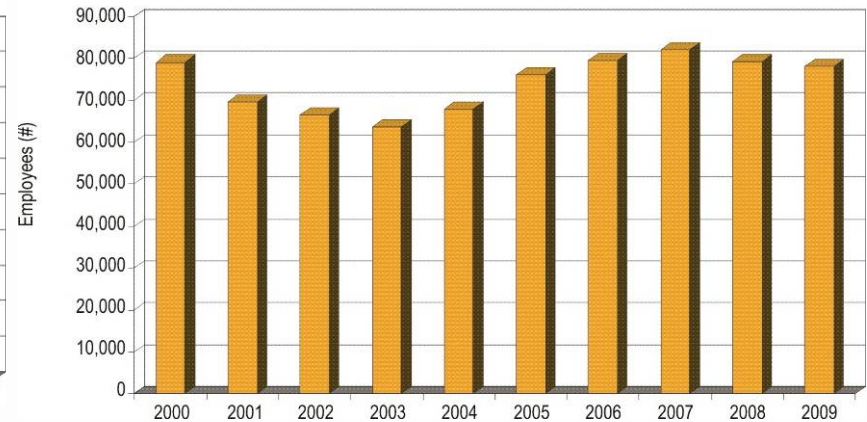


Changing Employment Mix: New Stability

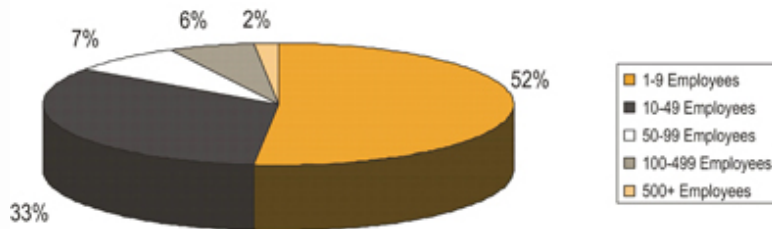
Companies in Knowledge-Based Industry
Ottawa Region
2000 - 2009



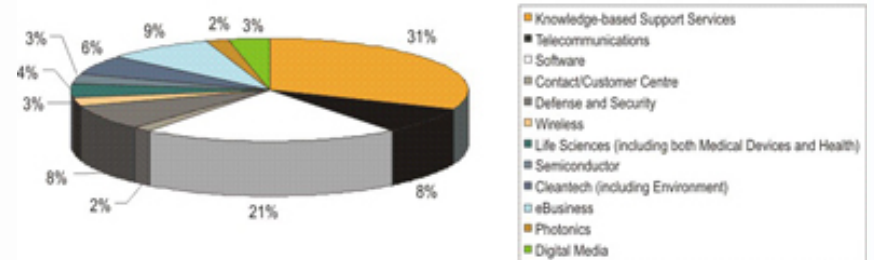
Employees in Knowledge-Based Companies
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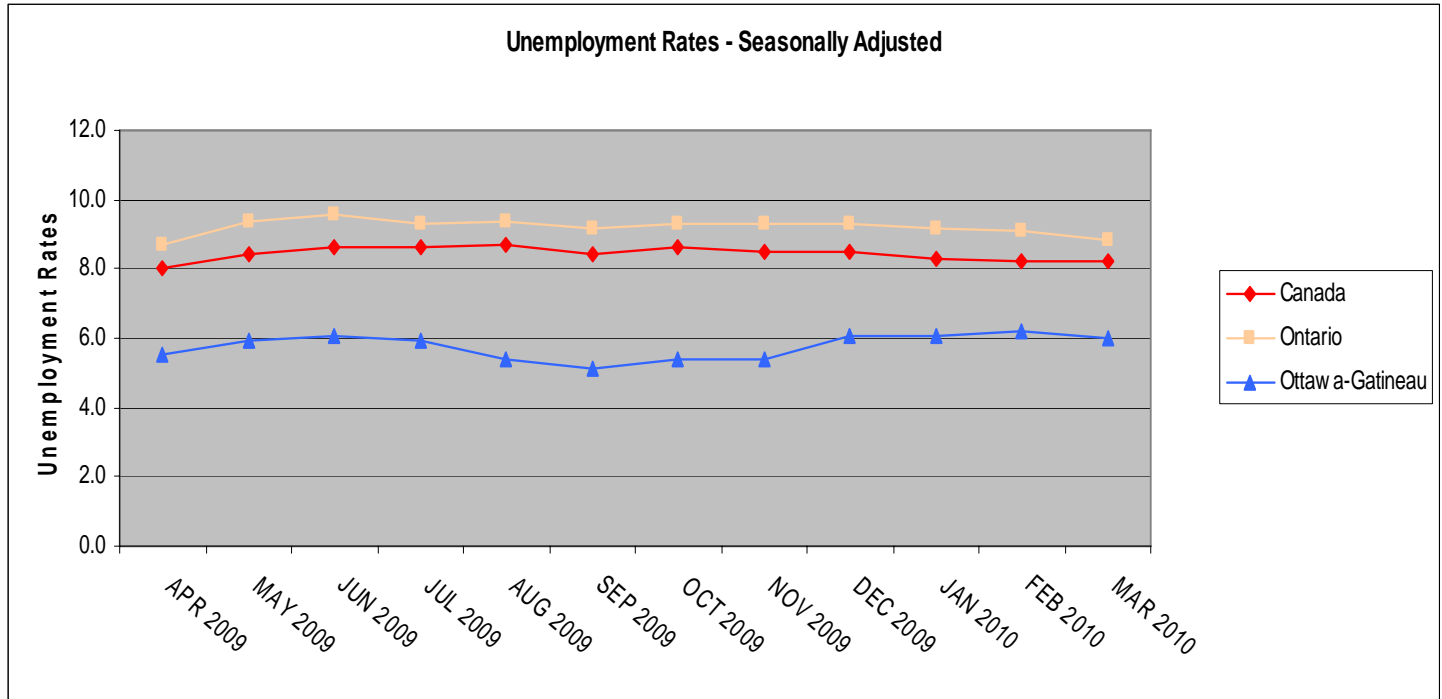
Companies in Knowledge-Based Industries by Size
Ottawa Region
2009



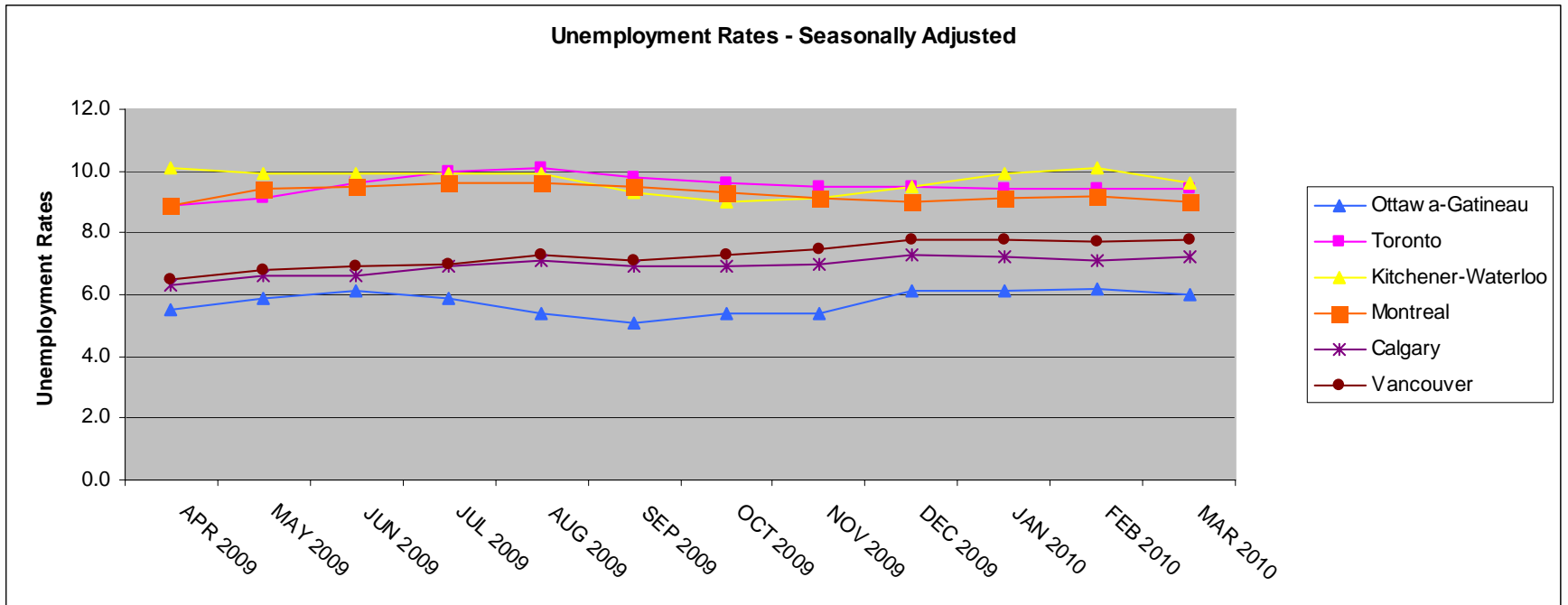
Companies in Knowledge-Based Industries by Cluster
Ottawa Region
2009



Surviving Global Financial Crisis & Nortel



Surviving Global Financial Crisis & Nortel



Innovation Economy

The new Economy is driven by knowledge and innovation

- Creativity-based, not manufacturing
- Companies are smaller (on average)
- Global connectivity means global competition
- Collaboration and competition is key to success

KBI = Knowledge-based industries

Ottawa Economy - KBI

Ottawa has a long history in innovation in knowledge-based industries (KBI) and has transitioned to new opportunities.

Reduced demand for telecom infrastructure

Diversity across wide range of sectors

Depth of talent pool is excellent

Strong entrepreneurial culture

Ottawa Economy - KBI

“Ottawa has the highest percentage of creative class workers in all of Canada, and one of the highest percentages in the world. Fully 43% of Ottawa’s workforce is employed in creative occupations, more than New York, London or San Francisco.... Ottawa dominates our listings of the best places to live by life-stage... Ottawa is a classic mean metro – more than half of its adult population (51%) has a college degree.”

Richard Florida, Who’s Your City

As a creative class metro, Ottawa ranks #1 in Canada and #3 in North America using the 3-Ts (Technology, Talent and Tolerance) as the metrics.

New Reality 1

- Transitioning to a sustainable economy in the post financial crisis era
- Movement from hardware to software: example Mitel
- Movement to IP world: March Networks, Mitel
- Building the wireless world: Dragonwave, Belair, Eion, Bridgewater
- Cashing in on the mobile world: RIM, Magmic, Fuel Industries
- Taking ICT to other sectors: Abbott Point of Care; Group IV, Cyrium, GridPoint

New Reality 2: Shenzhen Visit Apr 10

- Visited BreconRidge and Huawei
- BreconRidge, Ottawa company with 500 commodity manufacturing jobs in Shenzhen
- Huawei, Shenzhen company with new Ottawa Global Research Centre, 80 jobs going to over 200, areas: wireless, IP networking, optical technologies
- Higher skill, higher value jobs

Our MNE Presence: IBM

- GCE: Business Analytics
- GCE: Applications Security
- GCE: Java
- GCE: Software development tools
- Leads Eclipse Open Source Software Project

Our MNE Presence: Ericsson

- Purchased two of Nortel business units
- Acquired CDMA and LTE assets, access to North American markets
- Exceeded expected retention of Nortel staff, concentrating on LTE development
- A bright spot in their recent financial results
- Actively engaging local industry and community

Our MNE's: Alcatel-Lucent

- Ottawa Research and Innovation Centre
- Works on LTE development
- LTE connected car developed in Ottawa
- Develops LTE radio and antenna technology
- Uses QNX operating system

Our MNE's: RIM

- One of our fastest growing companies, +300 jobs in 2009
- Consumer applications
- Application software development
- Carrier interface software
- Recently acquired QNX, puts them in transportation space, brings QNX back to Canadian ownership

Our MNE Presence: General

- Of the “big 5” dominant network players, 4 have major R&D operations in Ottawa
- Ottawa is now the largest operating location of Ciena
- IBM is now Ottawa’s largest tech employer
- Innovative training programs have kept Abbott growing in Ottawa

Threats

- Lack of early stage and growth capital
- Global competition for talent
- Payback on institutional research

Key Innovation Clusters/Sectors

- Current Clusters:
 - Photonics
 - Enterprise Software / eBusiness
 - Wireless / Mobile Applications
 - Life Sciences (Medtech and Biomedical)
 - Security/Defence
- Emerging Clusters:
 - Communications Enabled Applications
 - Cleantech
 - Digital Media (Pervasive Media)
 - Virtual Education (Global eLearning)

Present Initiatives

- Innovation Leadership Team
- Ottawa 20/20 refresh
- Ottawa Technology Roundtable

Incubators/Accelerators/Portfolio

Lead to Win Ecosystem	49 companies
OCRI Portfolio	66 companies
NRC Incubators	23 companies
Wesley Clover	16 companies
Code Factory	4 companies
Exploriem	5 companies
OTTN	5 companies
<u>Other Communities</u>	
Entrepreneurs Edge	117 attendees
TON	1700 members
OCRI	671 members
Code Factory	110 members
TiE	>150 members

Photonics Sector

NORTEL

STI photonic systems inc.

oz Optics

GROUP IV
SEMICONDUCTOR

JDS Uniphase

Palladium 7

Enablence
Technologies Inc.

ONECHIP
PHOTONICS

XTERA®

Optiwave

Alcatel-Lucent **A**

Cyrium Technologies

FLEXTRONICS

ciena.

IRIDIAN Spectral Technologies

Carleton UNIVERSITY
Canada's Capital University

 National Defence

ALGONQUIN COLLEGE


uOttawa
L'Université canadienne
Canada's university

NRC-CMRC

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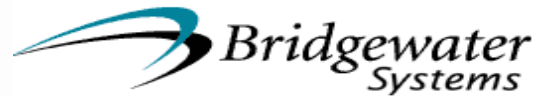


CRC

Ottawa

OCRI | GLOBAL MARKETING

Software Sector



Wireless Sector



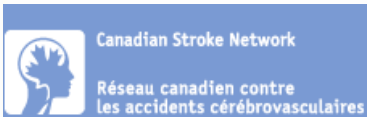
uOttawa
L'Université canadienne
Canada's university



National
Defence



Life Sciences Sector



Security/Defence Sector



Royal Canadian Mounted Police



uOttawa
L'Université canadienne
Canada's university



Communication Enabled Apps



Microsoft



AVAYA



BENBRIA



ROVE



NRC-CMRC



ALGONQUIN COLLEGE



Cleantech Sector

Cyrium Technologies

ENSYN
fueling the future.

Energate

EcoVu
ANALYTICS

Quadra
SYSTEMS



IOGEN
CORPORATION

Powerbase
energy systems inc.

CLEARFORD
INDUSTRIES
INC.
WASTEWATER SYSTEMS DIVISION

Varisolar
www.varisolar.com

THERMAL ENERGY
INTERNATIONAL INC.

magenn
wind power anywhere

performance
PLANTS

TRIACTA

PlascoEnergy
GROUP

ClimateCHECK
SET THE STANDARD

ABRI

GROUP IV
SEMICONDUCTOR

Seprotecth
Water. Pure and Simple

Carleton
UNIVERSITY
Canada's Capital University

 Natural Resources
Canada



SUSTAINABLE DEVELOPMENT
TECHNOLOGY CANADA™


uOttawa
L'Université canadienne
Canada's university

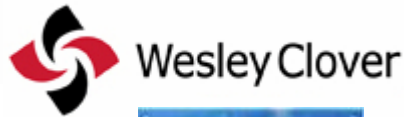
ALGONQUIN
COLLEGE

Ottawa

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OCRI | GLOBAL
MARKETING

Digital Media Sector



General Assembly Production Co



uOttawa



Canadian Heritage

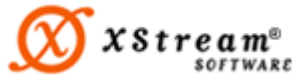
Patrimoine canadien



Canadian Television Fund
Fonds canadien de télévision



Virtual Education Sector



OUTSTART



Ottawa's Economy

When asked about Ottawa simply say:

Ottawa is Canada's Creative Economy Capital

We continue to diversify and strengthen

We continue to evolve and adapt