

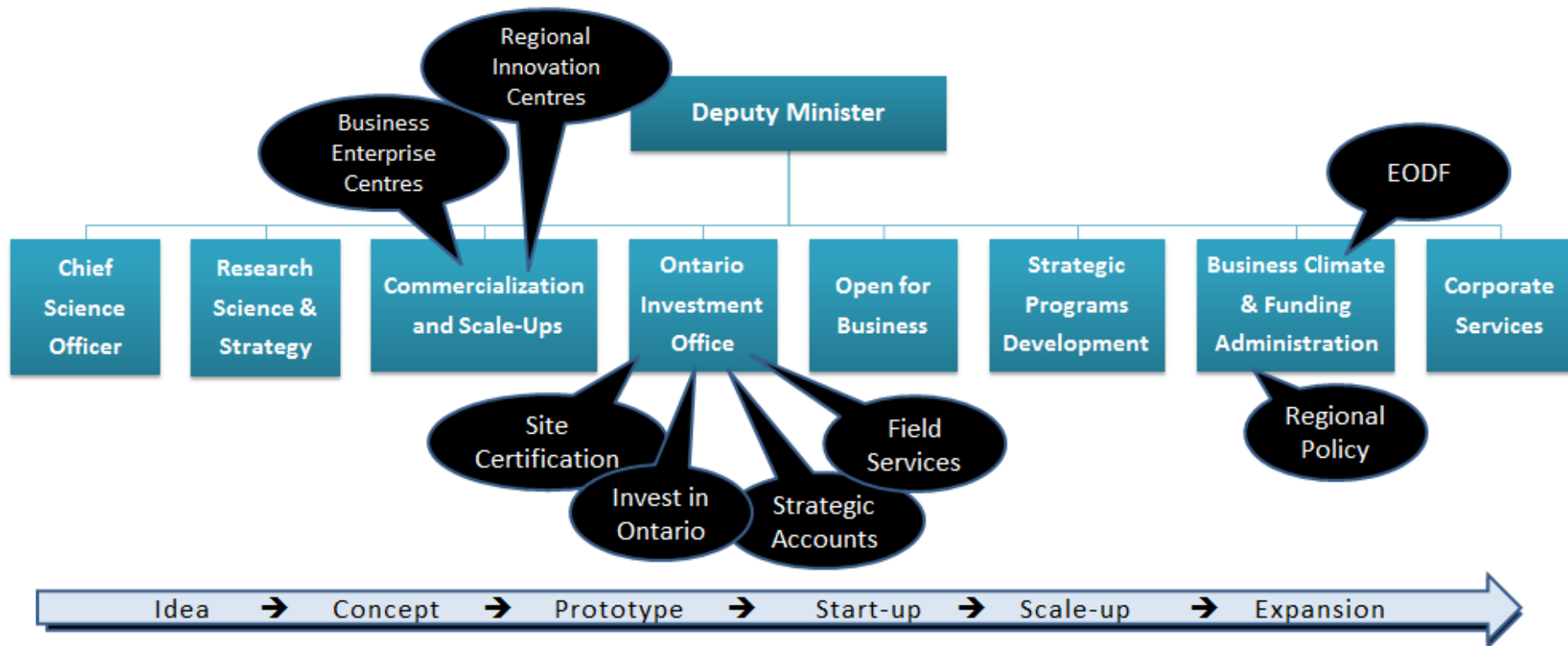


The Ontario Investment Office

How to Collaborate to foster Business Growth

OEMC 2017 – Wednesday September 13 2017

MEDG / MRIS



Ontario Investment Office



Chief Investment Officer



Investment Growth



Strategic Accounts



Marketing and
Creative
Services



Investor
Services



Technology
Adoption and
Regional
Growth



Automotive
Manufacturing
and
Technology



CleanTech and
Advanced
Manufacturing



Digital
Technology and
Life Sciences

Strategic Accounts: Priority Sectors

Ministry of Economic Development and Growth		
Clean Tech and Advanced Manufacturing Branch	Automotive Mfg and Technology	Digital Tech and Life Science Branch
ADVANCED MANUFACTURING	AUTOMOTIVE MANUFACTURING	FINANCIAL SERVICES
AEROSPACE & DEFENCE		INFORMATION TECHNOLOGY
CLEAN TECHNOLOGY		LIFE SCIENCES
CHEMICALS & MATERIALS		

Ministry of Agriculture, Food and Rural Affairs
FOOD & BEVERAGE MANUFACTURING
Ministry of Northern Development and Mines
MINING
Ministry of Natural Resources
FORESTRY
Ministry of Tourism, Culture, and Sport
TOURISM

CONFIDENTIAL ADVICE

Investor Services Branch



Chief Investment Officer



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Lead Generation and Investment Initiatives Unit

The Lead Generation & Investment Initiatives Unit is responsible for:

1. Leading the Ontario Investment Office's investment lead generation work by:
 - Triaging investment leads from multiple sources (IIDRs, SEOS, Federal Government, investinontario.com, etc); Qualifying all investment leads for entry into the Ministry's sales funnel for lead development and servicing.
 - Working with partners to service leads – OIO Strategic Accounts, partner ministries, and municipalities.
2. Coordinating the OIO's investment initiatives by:
 - Hosting familiarization tours for key FDI decision makers;
 - Planning strategic international travel opportunities to pitch Ontario as an investment destination; and
 - Generating interest about Ontario through international conferences and trade shows.

Business Concierge Services

- Business Concierge Services (BCS) will provide Advisory and Facilitation Services to OIO clients looking to establish/expand in Ontario including:
 - Business Opportunity Analysis & Market Insight
 - Incentives
 - Talent and Corporate Immigration
 - Government Liaison
 - Linkages to Local Service Providers
 - Employee Services

Site Planning and Coordination Unit

1. **Investment Ready: Certified Site Program:** Manages the design, delivery and marketing of the Investment Ready: Certified Site program, which includes pre-qualified industrial properties that are primed for development and have completed a significant amount of due diligence in advance.
2. **Site Selection Services:** Utilizes technical planning expertise, land and development intelligence and relationships with partner Ministries and municipalities facilitate location decisions for strategic investments:
 - a) **Confidential Province-wide Site Search:** Conduct confidential and customized Province-wide site searches of available industrial properties on the investor's or site selector's behalf, including vetting properties for development constraints.
 - b) **Site Evaluation:** Complete a review of a client's preferred Ontario sites, including a detailed evaluation of the area zoning and site due diligence to determine potential cost, timeline and unforeseen barriers to construction.
 - c) **Site Visit Coordination:** Coordination of site visits with municipal and regional partners including tours of properties, the community, research partners and companies.
 - d) **Permitting and Approvals Coordination:** Facilitating introductory meetings and coordination of on-going consultation with investors and necessary government officials to determine and coordinate a critical path for permits and approvals for construction.
3. **Research and Technical Expertise:** Maintains information and research on land-related data (i.e., borders, ports, utility infrastructure), community incentives and profiles, and best practices in land-based state incentives in North America.

1. Investment Ready: Certified Sites

- Ontario's Certified Sites are pre-qualified industrial properties that are primed for development and ready for investment, taking care of a great deal of groundwork and due diligence for site selectors and investors.
 - Selecting a Certified Site minimizes the risk of unforeseen delays in development process.
 - Ontario's Certified Sites are zoned to permit a range of industrial uses, fully serviced, free of major development constraints*, have met a certain level of due diligence** and have been reviewed by Government of Ontario ministries.

Certified Sites have met a certain level of due diligence and have additional information available:

- Environmental site assessment(s)
- Archaeological assessment(s)
- Species at Risk
- Ownership details and Title Opinion
- Zoning information
- Road and rail access
- Utilities servicing letters and maps (where available)
- Maps including property characteristics, developable area, adjacent properties and surrounding uses

*Program definition of development constraints include restrictions on title, identified flood zones, presence of significant natural environmental features.

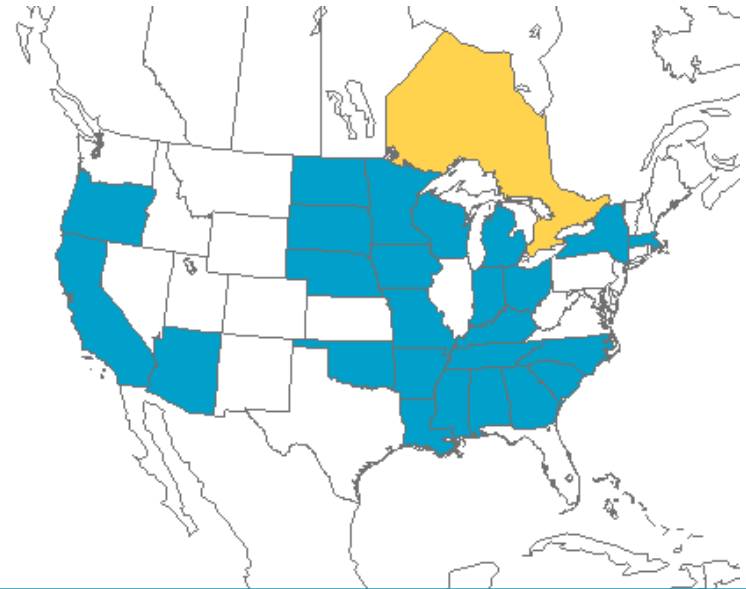
**For a full list of program requirements and details, please visit investinontario.com/sites



Growing Standard in North America

The most common buzzword in the site selection process is 'incentives'. However no incentive can overcome sites that have insufficient or skewed service capacities, significant development delays due to unknown infrastructure efficiencies, and stagnated permitting.

-Site Selection Magazine, March 2015
Site Certification: Time is Money



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Spotlight: Giant Tiger Distribution Centre



“The Johnstown industrial Park is one of Ontario’s first ‘Certified Site Program’ industrial parks. The Program encourages efficient site selection and helps projects get underway faster.”

Mayor Patrick Sayeau,
Township of Edwardsburgh Cardinal



- Over 300 acres of serviced land in Eastern Ontario with excellent transportation and logistics features was certified in February 2015.
 - Was vacant since 2001, until being certified through the Investment Ready Program.
 - Received **11 serious inquiries in its first 7 months** of certification.
- Purchased by Giant Tiger in September 2015 to build a 600,000 sq.ft. distribution warehouse and employ 300 people, representing a significant economic opportunity for a town of only 7000 people.
- A conditional land purchase agreement was signed **in only 5 weeks** after the initial meeting.



“...the availability of industrial land pre-certified for services by Ontario made the site attractive...”
Scott Reid, Giant Tiger Board Director

Upcoming Key Dates

Schedule your pre-application consultation

August 1 – October 16, 2017

Deadline to submit your application

October 20, 2017

Notification of Acceptance

December 22, 2017

KEY DATES



For the latest program details, visit:

www.Ontario.ca/CertifiedSite

For additional program information, email:

InvestmentReady@Ontario.ca

2a) Confidential Site Search

- Certified sites represent a selection of available properties suitable for potential investments.
- Working with the client to determine location and project-specific site requirements, a confidential Province-wide site search of available industrial properties can be conducted, including:
 - Development of a detailed list of location, transportation, utilities and site-specific requirements to be used for a site search;
 - Vetting of sites by technical experts to develop a short-list of recommended sites; and
 - Comprehensive information package of recommended sites for consideration, which also includes community profiles, workforce and talent information, proximity to suppliers and research institutes, municipal programs, market access, etc.

Spotlight: Tilray Production Facility

Announcing a Second Facility in Ontario



Tilray is converting this former pepper farm in Enniskillen, Ontario, into a cannabis production facility. (Photo courtesy of Tilray)

- After touring a number of locations in SW Ontario, and two other Canadian Provinces, a confidential site search was conducted on their behalf.
 - Based on site and location requirements, Sarnia-Lambton County (an area not previously considered by the Company) was identified as a potential location.
 - The Enniskillen property was one of 4 identified in the site search and then short-listed based on their requirements.

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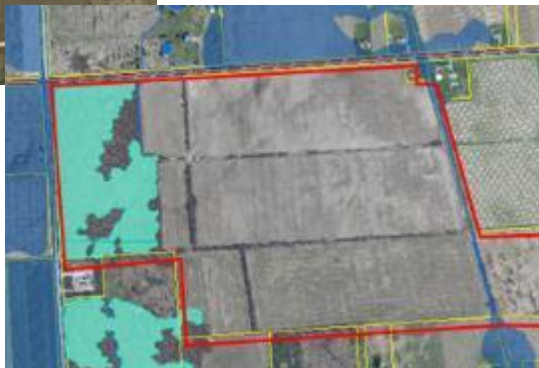
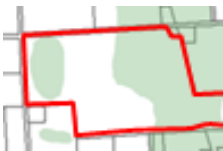


2b) Site Evaluation

- The OIO is eager to partner with a client, their project lead or their real estate agent to facilitate the site selection process. If potential Ontario sites have already been identified, a detailed evaluation of the area zoning and site due diligence to determine potential cost, timeline and unforeseen barriers to construction can be conducted, including:
 - Review of identified sites by technical experts familiar with Ontario's planning, approvals and development process to identify potential site concerns and issues;
 - Identification of potential studies required due to natural heritage and other environmental features on the site; and
 - Coordination of review of identified sites by other government departments (such as the Ministry of Environment, Ministry of Natural Resources, Ministry of Transportation, etc.) to gather additional information and identify and/or mitigate any development concerns.

Spotlight: Natural Features Review

- A potential investor identified three possible sites via his real estate agent.
- A review of the site against the full zoning by-law indicated potential concerns around the required outdoor storage plans necessary for the project.
- A review of the site against natural heritage features revealed the following:



- A watercourse through the property, creating additional facility design considerations.
- Two evaluated wetlands at the rear of the property.
- In coordination with partner Ministries, it was determined that a full archaeological assessment for the property had been completed and filed. A copy of the confirmation letter was provided to the client.
- A letter of known Species at Risk was also provided to the client.
- Based on this evaluation, OIO identified an estimated timeline for development approvals for the investor.

2c) Site Visit Coordination

- Before location decisions are made, a series of site tours will likely be conducted.
- It is important for site visits to maximize the investor's limited time, as well as ensure a community's assets and value proposition is adequately and accurately showcased.
 - The OIO will work with local community partners to coordinate site visits that ensure an investor has access to political leaders, economic development officers, planning and building officials and utility service providers. Meetings and tours with other project-specific partners, including university and colleges, industry associations and potential supply partners can also be arranged.
 - An agenda is developed and shared in advance and members of the OIO are pleased to participate in the tour to ensure the project can move forward as swiftly as possible.

2d) Permitting and Approvals Coordination

- Project costs are an important factor when determining a location; however, project timelines for operation is also a critical decision factor for each project.
- The OIO will work with an investor to identify, coordinate and streamline the due diligence and development approval process for new facility construction. This includes:
 - A single point of contact within the OIO to act on an investor's behalf to outline and interpret Ontario's approvals process and propose creative solutions to drive the approval process forward; and
 - Introductory meetings and on-going consultation with government officials to develop and monitor a critical path for permits and approvals for construction; and
 - Assembly and coordination of multi-disciplinary government project team to aid the investor to meet specified project milestones and timelines; and
 - Regular communications, monitoring and reporting of project status.

Spotlight: GE Canada Brilliant Factory

- To provide comfort that project timelines could be met, the OIO coordinated the development and site approvals process for the Brilliant Factory investment.
 - An approvals critical path document was created to act as a single reference document to aid GE, Ministries, the Municipality and Regional Conservation Authority to meet timelines by tracking the requirements/process for more than 20 approvals.
 - Key ministry contacts and document requirements for each regulatory approval were outlined and provided to the company. A commitment to fast-track all permits, where possible, was also secured.
 - The OIO hosted weekly project status meetings for more than 6 months until the majority of approvals were complete, and GE indicated they were no longer required.

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A one-window approach to site selection

Ontario's collaborative approach was especially useful during GE's site selection process, notes Ms. Warburton.

"The way the ministry did this was to assign one specific person for us to work with," she says. "It was a one-window approach - we always felt like we were working with the province, the region and the municipality and that everyone was providing information, data and insight. It was fantastic."



Kim Warburton, VP Communications, GE Canada

3 Research and Technical Expertise

- In addition to sector-specific information, a wide variety of site and location specific data and is required by investors during their site selection decision process.
- The SPC unit is working to build and maintain a repository of land-related data and community information to be utilized in its work with investors and site selectors.
- This includes:
 - Municipal-based Incentives (CIP, FTZ and others) and Community Profiles
 - Utilities Infrastructure (Natural Gas, Electricity, Telecom)
 - Ports and Shipping Data
 - Intermodal Facilities
 - Highway & Rail Infrastructure
 - Borders and Airports
 - Site Specifications, Industrial Development and Real Estate

Questions?

Contact Us

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Technology Adoption and Regional Growth Branch



Chief Investment Officer



Investment Growth



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Investor
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Technology
Adoption and
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Automotive
Manufacturing
and
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CleanTech and
Advanced
Manufacturing



Digital
Technology and
Life Sciences

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Technology Adoption and Regional Growth



**Transformative
Technology
Adoption**



**Technology
Partnerships**



**Field Services
(Former BAS)**

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Transformative Technology Adoption

Mandate - Support Ontario SMEs to adopt, develop or scale transformative, advanced or disruptive (TAD) technologies and business models to gain competitive advantage



Provide our clients **information, trends & insights** into relevant TAD technologies and the adoption of these technologies



Identify and help arrange **educational & networking events**



Introduce our clients to a network of advanced technology suppliers, potential customers, partners



Engage with **ecosystem partners** who can provide **targeted assistance** for **technology adoption and development**

Technology Partnerships Unit

- Acting as a link between Ontario SMEs and policy work across MEDG and broader government.
- Providing tools and analysis to OIO Field Services to assist SMEs in understanding government policy initiatives such as:
 - Climate Change Action Plan
 - Cap and Trade
 - Bill 148: Fair Workplaces, Better Jobs Act/Changing Workplaces Review
- Representing SMEs at policy tables in the development of policies and programs that will directly affect their business:
 - Green ON Fund
 - Energy Prices
- Developing a strategy to provide a more efficient way for small businesses to interact with government services.

Field Services

Mandate - Advancing Ontario business growth, innovation, and regional prosperity

- Help **small and medium-sized enterprises** (SMEs) with tradable goods and services, become more competitive and grow both domestically and internationally
- Engage within **local and regional partners** (Municipalities, EDO's, ONE Network, Inter-Ministerial) to support efforts that attract, retain and help expand SMEs

Field Services

Who we help?

1. High Growth Firms
2. Poised for High Growth
3. Regionally Important
(significant employer / supply chain importance)
4. Up and Coming (Gut feel)
5. Legacy Companies
6. Others (OIO, Aftercare, etc)

Where we help?

1. Business Retention
2. Expansion / New Mandate
3. Increase Sales / Exports
4. Emissions Reductions
5. Reduce Costs
6. Enhanced Productivity
7. Innovation
8. Technology Adoption
9. Succession Planning
10. Advisory Support

Field Services

How we help?

- Work with senior executives / owners of SMEs
- Develop an understanding of the company's challenges and identify opportunities
- Connect companies to government, association and private sector forms of assistance – programs, services, resources, people
- Act as a single point of contact for a broad range of programs and services
- Act as sounding boards for strategic growth plans

Field Services

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Regional Manager (A)

Amy Britten

519-571-6074

CENTRAL Region

Regional Manager (A)

Rob Schock

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Regional Manager

Lynne Groulx*

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Orleans
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Stormont – Dundas
– Glengarry
Cornwall

Diane Pelletier * · 613.241.3841 x224 · Eastern Region Administrative Assistant

How to Collaborate

- There is an area of the OIO to complement most business activities:
 - Business Growth
 - Business Retention
 - Leads
 - CED Initiatives
 - Certified Sites
 - Globally-mobile greenfield investments
 - Sharing Success (social media, website, etc)
 - New Community Information