

Western
Research Parks

Western
Research Park

Today's Agenda

- Western Research Parks Update
- Report on:
 - Stiller Centre
 - London Medical Innovation Network
 - AMP/Fraunhofer Project Centre
- Opportunities and Challenges
- Next Steps

Western
Research Park

Western Research Parks

<p>Discovery Park Health Sciences IT Medical Devices Imaging Analytics</p>	<p>Advanced Manufacturing Park Materials Wind Automotion Power Environment</p>	<p>Sarnia-Lambton Research Park Bio-Industrial Chemical Energy Agriculture</p>
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Effectively Links the Region's Research Strengths with Commercial Opportunity

Western
Research Park

Fast Facts

- 70 Hectares.
- 624k sf Commercial/Lab/Flex space.
- 98% Occupancy.
- 95 High-tech tenants.
- 1,607 Knowledge workers.
- Estimated \$112 million contribution to regional economy each year.

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Research Park

Sample Tenant Mix

Anchors	Early Stage	Research Centres	Support Network
Lanxess	Renix	Surface Science	Techalliance
Enbridge	ESS	Fraunhofer	OCE/IRAP
Nova Chemical	PolyAnalytik	NRC	WORLDiscoveries
Worley Parsons	PulseInfoFrame	WindEEE	Propel/LEAP
Curocom	Sernova	Cimtec	UnLondon
Hexicon	BioAmber	Lambton College/BTAC	Local Angels
Atelka	KGK Synergize	Ivey	

Our Vision

Western's Research Parks are world- renowned destinations where:

**talent and technology,
industry and invention,
dreams and discoveries,**

**converge to create extraordinary works for the
benefit of our world and our future.**

Our Mission

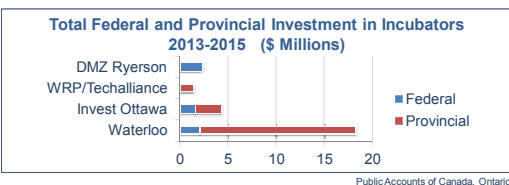
**To serve as an enabler for
invention, economic growth, employment,
wealth-creation and social good
in the London region.**

Our Successes

- **35 Graduate Cos. 770 Estimated Jobs Created.**
- **Notable Grads incl: EK3, Voices.com, Enable**
- **Western is the 1st University in Canada to be recognized as an IEP University.**
- **Ranked 5th among University Incubators in North America and 2nd in Ontario in 2015.**
- **Ranked among the Top 30 University-based Incubators in the world.**
- **One of only two Self-Sustaining Parks in Canada.**

Creds

- **Western's Executive Commitment.**
- **Park's 2/3 - 1/3 Tenant Formula.**
- **Efficient and effective ESN.**



THE STILLER CENTRE
FOR TECHNOLOGY COMMERCIALIZATION



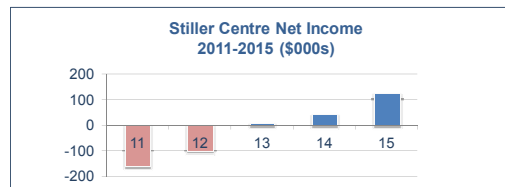
The Turnaround

- **Assumed operations in June 2010.**
- **86% Occupancy in 2010.**
- **Management change in May 2012.**
- **Consolidated support programs under Techalliance.**
- **Reduced overhead.**
- **Improved incubation services.**



The Turnaround

- **Centre now sits at 100% Occupancy.**
- **Centre is financially self-sustainable.**
- **Park is returning City's \$200k in 2017.**



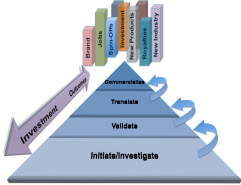



**London
Medical
Network**




The Network Vision

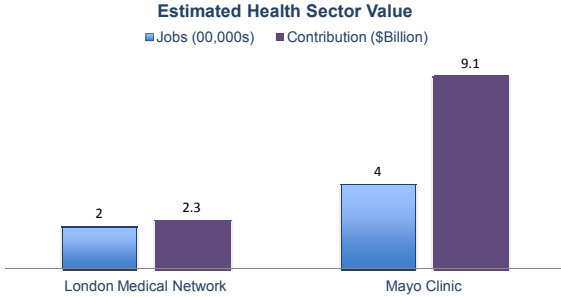
To become a globally renowned leader in convergent medical research, innovation and commercialization initiatives that materially improve the health, wealth and prosperity of our community and the world around us.


The Comparator

Estimated Health Sector Value

■ Jobs (00,000s) ■ Contribution (\$Billion)




Organization	Jobs (00,000s)	Contribution (\$Billion)
London Medical Network	2	2.3
Mayo Clinic	4	9.1



The Game Plan

1. Converge London's medical research, clinical and commercialization strengths into a series of team-based Medical Innovation Centres.
2. Co-locate the Centres with industry and entrepreneurs to create commercialization hubs.
3. The 1st Centre, to be located at Western Discovery will focus on:
 - Musculoskeletal and Brain Health



The Returns

- Phase I valued at \$125 million. (12x).
- Nearly 550 new long term jobs in research, industry and early stage companies.
- Estimated \$40 million contribution to local economy annually.
- Nearly \$60 million in indirect employment.
- Medical advances from Phase I alone could help 20 million Canadians and over 1 billion people worldwide suffering from MSK/Brain impediments.



The Team

Governing Council Members (9)

Mr. Frank Angeletti Co-Chair
 Mr. Paul Kaplan Co-Chair
 Dr. Michael Strong
 Dr. David Hill
 Mayor Matt Brown
 Dr. John Capone
 Dr. Gillian Kernaghan
 Mr. Murray Glendenning
 Mr. Martin Hayward

Operating Team Members

Mr. Paul Paolatto
 Ms. Lyndsay Cassidy

Business Advisory Members (6)

Mr. John Drake
 Ms. Marilyn Sinclair
 Mr. Joaquin Balles
 Ms. Laurie Lashbrook
 Mr. Alex Weiner
 TBD

Scientific Advisory Members (3)

Dr. Jack Bend
 Dr. Bhagi Singh
 Dr. Jack Gaudie



Progress To-Date

- Initial operating structure established.
- JV Agreements completed and NFP established.
- New Agreement w City approved by GC.
- Western has invested ~\$1.1 million YTD (14 FTEs).
- Additional fundraising underway.
- Research Leader targeting/recruitment underway.
- Industry partner targeting/recruitment underway.
- Project solicitation and implementation underway.



Western
 Advanced
 Manufacturing Park



AMP/Fraunhofer Project Centre

- 4 Tenants, 30 employees/researchers plus associated staff
- Fraunhofer working with over 40 companies
- Auto OEMs including Ford and General Motors
- Material Suppliers such as Hexion and Laval
- Supporting entire supply chain process
- Automotive, defence, building products, green energy and consumer sectors
- Upcoming CAFE vehicle emission legislation



AMP/Fraunhofer Project Centre

- FPC is centre point of the International Composite Research Centre.
- Fraunhofer Centre has 3 Global first technologies and 3 North American firsts.
- Approved for prototype production capability.
- Research Support from Province and Federal.
- Ongoing support from LEDC.
- Recognized as a National Centre of Excellence.
- Building strong partnerships across Canada and globally.



Other ED Initiatives

- KPMG report shows \$3.1 billion economic impact in London - \$500 million students and visitors.
- Roberts Clinical Trials – 105 staff moving to Downtown London in January – additional staff members will be added through Q1.
- Western is a strong partner in the City of London Economic Roadmap.
- WORLDdiscoveries Asia.
- Innovation Village.



WORLDdiscoveries Asia

- Three offices in Asia.
 - Nanjing, Tanjin, Hong Kong
- 5 FTE's in China.
- 10 material deals executed valued a \$4 million CAD.
- First Joint Venture ever executed between North American University spin-off company and a Chinese multinational.
- Weiming Environmental is the Joint Venture ever to be listed on an Asian Stock Exchange (603568.SS).
- WD Asia now representing 7 Ontario Universities.



Innovation Village

- Provides valuable maker-space and accelerator space for Propel, LEAP clients, student entrepreneurs, start ups and spin-offs, embedded business leaders.
- Serves as an international attraction tool for the world's best and brightest.
- Serves as a statement-piece for London's RD&C Capacity.



Overall Goals

1. Generate Economic and Social Value.
2. Facilitate World-Class RD&C.
3. Build the Community's Brand.
4. Support with Western and the Community's Research Interests.

The Parks Game Plan

1. Maintain Anchor/Incubator Balance.
3. Establish Discovery Park as a leading RD&C Centre in Convergent Sciences.
4. Establish AMP as the hub for the next generation of manufacturing in Canada.
5. Continue to Pursue new Industry Partners.
6. Continue to trumpet Tenant Successes.

Game Plan (continued)

7. Secure funding for Innovation Village.
8. Secure a new home for the Network.



