Scaling innovation for impact

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Toronto

Canada’s Global Innovation City

• 6 million people in GTA – 4th largest city in North America
• 50% of Toronto population was born outside Canada
• One of North America’s top 3 ICT clusters and top 3 biotech clusters
North America’s largest urban innovation hub

1.5 million sq ft across 4 contiguous buildings, with direct subway & streetcar access
120 Tenants (70+ startups) – growing to 250+ Tenants and 150+ startups
Convening startup innovators with the financial, academic & business communities
### How MaRS Works - More Than A Building, More Than An Incubator

**MaRS is an Innovation Hub in a leading district**

<table>
<thead>
<tr>
<th></th>
<th>Innovation Centre</th>
<th>Incubator</th>
<th>Accelerator</th>
<th>Innovation Hub</th>
<th>Innovation District</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Where?</strong></td>
<td>Building</td>
<td>Space</td>
<td></td>
<td>Place in Toronto (also IP address, soft landings)</td>
<td>Multiple buildings</td>
</tr>
<tr>
<td><strong>Who?</strong></td>
<td>Varied tenants</td>
<td>Startup ventures (general)</td>
<td>Startup ventures (selected cohort)</td>
<td>Startup ventures (w/ growth potential) Incubators Corporate MNEs Univ. startups Research inst.</td>
<td>Startup ventures (esp. university) Incubators Corporate MNEs Universities Research inst.</td>
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<tr>
<td><strong>What?</strong></td>
<td>No programming</td>
<td>Venture services</td>
<td>Venture services Capital</td>
<td>Venture services Capital Talent Systems (incl. policy) Corporate cxns Global networks</td>
<td>No centralized programming</td>
</tr>
<tr>
<td><strong>Canadian examples:</strong></td>
<td>Communititech TEC Edmonton</td>
<td>Creative Destruction Lab</td>
<td></td>
<td>MaRS</td>
<td>Toronto’s Discovery District</td>
</tr>
</tbody>
</table>

* Have announced intention to pursue a Hub model.
Select MaRS Centre Tenants
Bringing the innovation ecosystem together

Start Ups
- Synaptive
- Blue Line
- Arctic
- Transition Therapeutics Inc.
- Woodland Biofuels Inc.
- Alpha Cancer Technologies
- LEAGUE
- Triphase
- Encycle therapeutics
- Moleculight
- HORIZN
- Expertfile
- Highland Therapeutics
- EyeCarrot
- Circlesci

Corporations, Capital & Service Providers
- Autodesk Research
- BDC Entrepreneurs first
- Merck
- Moneris
- Manulife
- Norton Rose Fulbright
- Baxter
- Emerald Technology Ventures
- RBC Financial Group
- Facebook
- Etsy
- Celtic House Venture Partners
- Airbnb
- JLABS
- CIBC

Ecosystem Partners (Public)
- Grand Challenges Canada
- NRC-INDC Industrial Research Assistance Program
- Ontario Genomics Institute
- OICR
- SiG
- UHN
- University of Toronto

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MaRS works with ventures across Health, Cleantech, ICT (incl. FinTech) – these are just a few examples.
Capital raised by MaRS ventures

$349M  $451M  $547M
2012  2013  2014

>$1.3 Billion raised in the last 3 years

SOURCE: ALL VENTURE NUMBERS AS REPORTED IN THE 2012-2014 VENTURE CLIENT ANNUAL SURVEYS. FOR DETAILS, SEE MARSDD.COM/SURVEY-METHODOLOGY.
Revenues generated by MaRS ventures

2012: $161M
2013: $201M
2014: $280M

>$640 Million generated in the last 3 years
(majority from exports)

SOURCE: ALL VENTURE NUMBERS AS REPORTED IN THE 2012-2014 VENTURE CLIENT ANNUAL SURVEYS. FOR DETAILS, SEE MARSDD.COM/SURVEY-METHODOLOGY.
WHERE MARS PLAYS: URBAN INNOVATION HUB IN CANADA’S LARGEST CITY

MaRS is anchored in Toronto...and we have work to do

Relative to other top innovation cities, we lag in tech exports and venture capital. *

High ranking
Mid ranking
Low ranking

Country level
Region / City level

Developing talent
Growing ventures
Opening markets

Silicon Valley
San Francisco
New York
Boston
Beijing
Hong Kong
Singapore
Berlin
London
Toronto

Technology Exports
Market Absorption
Role of Government
Entrepreneurial Talent
University Commercialization
Venture Capital
Innovation Brand

USA
Rest of World

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* Preliminary analysis – we are continuing to refine our comparative metrics.
1. Brand
Recent MaRS news coverage highlights innovation impact

GLOBE AND MAIL: To fully exploit Canadian IP, keep it tied to our innovation hubs

'Ve're at an inflection point': Why Ontario health tech startups may finally be able to find financing at home

TORONTO STAR: MaRS research hub nurtures entrepreneurs | Toronto Star

BETAKIT: Autodesk to take over 60,000 square feet of MaRS West Tower
2. International Engagement
Canada House San Francisco
3. Applied Innovation
Hydrostor energy storage solution

Land Station includes mechanical and electrical equipment

Pipeline

Underwater Station includes air storage cavity

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4. Initiative Development: TO Health
5. Policy Solutions
Sharing Economy Regulation
6. Partner Development
Hong Kong Mayoral Mission visit with MaRS FinTech and Cyberport
7. Joint Communications

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#StartUpHereTO
Developing talent • Growing ventures • Opening markets

THANK YOU!

INNOVATION

BECAUSE THE FUTURE MATTERS

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