



## 2009 OCETA SDTC CLEANTECH GROWTH AND GO-TO-MARKET REPORT

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### The 2009 OCETA SDTC Cleantech Growth and Go-to-Market Report

Ontario has a well-deserved reputation as a source of world-class research and innovation. Our universities, research institutes and technology and service based businesses have all contributed to the development of a strong Ontario and commercial success.

In the last eight years, the Ontario government has invested close to \$3 billion in research and innovation. Ontario's recently announced \$1.15 billion *Next Generation of Jobs Fund* builds on this investment to transform Ontario into a knowledge-based economy. Much of this investment is focused on strengthening the relationships between those doing research and those who want to bring the technologies and products of basic and applied research to market.

### Ontario's Emerging Clean Technology Industry

An important future source of economic growth and job creation in Ontario is the Clean Technology industry. The sector includes businesses that make products or provide services that improve performance, productivity or efficiency, while significantly reducing costs, resources, energy consumption, waste, and pollutants.

While there is no specific data on the Clean Technology sector in Ontario, according to the Ontario Environment Industry Association, there are an estimated 2,600 environmental companies operating in Ontario, employing 65,000 highly-skilled Ontarians, generating \$7 billion in annual economic activity. The Clean Technology sector is still comparatively small, but it is growing fast, and is attracting private investment. In November 2007, Goldman Sachs reported that North American Clean Technology venture capital investment of \$3.5 billion in 2006 represented 45 per cent growth over 2005.

### Why The Annual Cleantech Growth and Go-to-Market Report?

The opportunities for Ontario's Clean Technology companies are promising. However, world-class technology does not guarantee commercial success, and Ontario's Clean Technology companies face unique challenges to become global leaders. To grow and be profitable, Ontario Clean Technology companies will need access to sufficient capital and management talent, market demand for their solutions, and an ability to effectively market and sell their products and services to domestic and international buyers.

In a 2008 study by the Conference Board of Canada, Canada ranked 13<sup>th</sup> out of 17 countries in commercializing, marketing and selling innovative technologies. Unlike other countries, Canada is not taking steps to ensure that science and research can be successfully commercialized and used as a source of competitive advantage. Building a vibrant and globally-competitive clean technology industry will require Ontario's companies to become world-class marketers and sellers of their innovations.

As they do battle in the market place, Ontario's Clean Technology companies, their investors and their partners can learn from the success of their peer Clean Technology companies operating at home and abroad. For this reason, the Ontario Centre for Environmental Technology Advancement (OCETA) and The Russell-Mitchell Group have initiated the **Annual Clean Technology Report**.



## Scope of The 2009 OCETA SDTC Cleantech Growth and Go-to-Market Report

As the first Ontario profile of its kind, the *Report* will focus on surveying Ontario's Clean Technology industry, and identifying the unique challenges faced by Ontario-based companies in successfully commercializing their innovations. We will survey a select group of Ontario's most successful and promising Clean Technology businesses.

**Industry Survey.** The *Report* will provide a general survey of the Clean Technology industry in Ontario in the following sub-sectors:

- **Bio-fuels and Bio-energy** (including feedstocks, harvesting, conversion, production, and distribution technologies);
- **Energy Generation** (solar, wind, hydro, geothermal, co-generation, fuel cells);
- **Energy Management** (management systems, infrastructure, storage, energy efficient products);
- **Waste Management** (recycling, material handling and sorting, hazardous waste elimination, energy from waste);
- **Transportation** (automotive, aviation, rail, mass transit);
- **Water and Wastewater** (purification, treatment, infrastructure, conservation);
- **Manufacturing and Industrial** (process efficiency, pollution prevention, emission control);
- **Materials** (advanced materials, nano-materials); and
- **Remediation** (contaminated sites and Brownfield redevelopment).

**Industry Commercialization Best Practices.** The body of the *Report* will outline challenges faced by Ontario-based Clean Technology companies in the commercialization of their technologies, and describe best practices in the following areas:

- **Direct and Indirect Sales;**
- **Market Strategy;**
- **Intellectual Property Strategy;**
- **Product Management and Marketing;**
- **Commercialization; and**
- **Financing and Partnerships**

**Ontario's Market for Clean Technologies.** Ontario's market for clean technologies is not well understood, and while many of Ontario's Clean Technology companies are export-oriented, our domestic market provides a unique opportunity for Ontario-based companies. The *Report* will provide an overview of Ontario's demand and trends for clean technology products and services from both Public and Private Sectors, with special attention to large manufacturers, commercial and residential builders, transportation firms, and infrastructure developers.

## How will The 2009 OCETA SDTC Growth and Go-to-Market Report be published?

The *Report's* insights will be published in a number of different formats, including:

- **2009 OCETA SDTC Cleantech Growth and Go-to-Market Summary – A summary of findings and key data designed for general readership;**
- **2009 OCETA SDTC Cleantech Growth and Go-to-Market Report Website;**
- **2009 OCETA SDTC Cleantech Growth and Go-to-Market Report – The comprehensive Report, intended for executives and managers of Ontario's Clean Technology companies, industry suppliers and service professionals; and**
- **2009 OCETA SDTC Cleantech Growth and Go-to-Market Report (Press Package) – An abridged version of the Report designed for the Media.**



## Related Events and Reports

OCETA and The Russell-Mitchell Group will host a number of related events to launch, present and promote the *Report*.

### 2009 OCETA SDTC Cleantech Growth and Go-to-Market Report Launch Event

February 2009 – *The 2009 OCETA SDTC Cleantech Growth and Go-to-Market Report* will be officially launched on February 17, 2009 in Toronto, Ontario. Attending this event will be executives of companies participating in the *Report*, investors and service providers to Ontario's Clean Technology industry, and business leaders and decision-makers of organizations who are potential buyers of clean technology products and services. Also expected to attend will be politicians and senior government officials from the Ontario Ministries of Research and Innovation, Economic Development and Trade, and Environment, as well as members of academia and key innovation agencies such as the MaRS Discovery District and the Ontario Centres of Excellence. The guest list for the launch event will be developed in close collaboration with all sponsors.

### The 2009 OCETA SDTC Cleantech Growth and Go-to-Market Report Briefing Series

In Spring 2009, we will conduct a regional briefing series on the *Report's* findings. Briefings are planned for Ottawa, North Toronto and Kitchener-Waterloo. A national briefing series is also being contemplated with the *Report's* sponsors with Montréal, Calgary and Vancouver as candidate cities.

### Report to the Ontario Provincial Government

February 2009 - This report will provide policy considerations to the Province of Ontario to stimulate the profitable development of the Clean Technology industry in the context of Ontario's Next Generation Jobs Fund and Greening Ontario strategy.

### About OCETA

OCETA is a private, not-for-profit Corporation that supports the commercialization and market adoption of innovative technologies and environmentally sustainable solutions. OCETA promotes and enhances Ontario innovation by acting as a value-added intermediary to provide timely connections to partners and capital, and to deliver programming, business advisory and technical services. OCETA has specific mandates from municipal, provincial and federal governments to promote the profitable development of Ontario's Clean Technology sector. Since its formation in 1993, OCETA has advised and assisted some 1,500 environmental and Clean Technology companies in Ontario with commercializing their innovations.

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### About The Russell-Mitchell Group

The Russell-Mitchell Group is a management consulting firm dedicated to helping Canada's high-technology companies become globally competitive. Founded by industry veterans with decades of operating and consulting experience, The Russell-Mitchell Group has helped some of Canada's most successful technology companies accelerate growth and become market leaders. With offices in Toronto and Ottawa, The Russell-Mitchell Group serves clients in Clean Technology, Information Technology, Telecommunications, and Biotechnology.

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### About SDTC

Sustainable Development Technology Canada (SDTC) is an arm's-length foundation which has received \$1.05 billion from the Government of Canada as part of its commitment to create a healthy environment and a high quality of life for all Canadians.

SDTC operates two funds aimed at the development and demonstration of innovative technological solutions. The \$550 million SD Tech Fund™ supports projects that address climate change, air quality, clean water, and clean soil. The \$500 million NextGen Biofuels Fund™ supports the establishment of first-of-kind large demonstration-scale facilities for the production of next-generation renewable fuels.

SDTC operates as a not-for-profit corporation and has been working with the public and private sector including industry, academia, non-governmental organizations (NGOs), the financial community and all levels of government to achieve this mandate.