WINDOW ON THE LIFE SCIENCES IN THE GREATER MONTREAL: INNOVATION, EXPERTISE, GROWTH.
NAVIGATING
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chapitre 2.4
MONTREAL, MAJOR HUB FOR LIFE SCIENCES AND HEALTH TECHNOLOGIES (LSHT) IN NORTH AMERICA

A favourable political and financial environment, a pool of expertise, advanced facilities and a gateway to North America and Europe: Montreal offers the best conditions for success for the life sciences and health technologies (LSHT) sector, a more than 1.95-trillions industry on a global scale.
MONTREAL’S LSHT SECTOR IN FIGURES.

Ranks **10th** among the metropolitan regions active in LSHT in North America and **7th** in terms of LSHT job concentration.

40,000 direct jobs in Greater Montreal, representing nearly 80% of direct LSHT jobs throughout Quebec.

6.9% growth in employment between 2011 and 2014.

19 new businesses moved to Montreal between 2012 and 2014.

$1.6 billion in venture capital investment in LSHT from 2001 to 2011 (33% of the Canadian total).

+ $1B dollars in public research since 2010*.

Greater Montreal’s real GDP in LSHT represents approximately 65% of that of the industry’s throughout Quebec.

THE CLUSTER:  

*From the IRSC*
WHAT MAKES MONTREAL SO ATTRACTIVE?

A MORE FAVOURABLE INVESTMENT CLIMATE

- An R&D tax burden that's **two to five times** lighter than other metropolitan centers of the West.

- **Total LSHT operating costs** are among the **lowest** of any major city in North America and Western Europe.

- **Wages** 2% to 10% **(on average)** less than the salaries of major North American cities specialized in LSHT.

- Inexpensive, abundant, clean **electricity**.

QUICK ACCESS TO MAJOR WORLD MARKETS

- Ideal **transport infrastructure** and **location** for exports.

- From 2006 to 2011, Greater Montreal’s LSHT exports accounted for **more than $5 billion**.
A POOL OF MOTIVATED AND SKILLED FUTURE PROFESSIONALS
Eight institutions of higher education offer programs in life sciences.

Two medical schools and three university hospitals.

27,000 students and 6,300 graduates.

INTERDISCIPLINARY SECTOR COLLABORATION
A high concentration of leading companies, from SMBs to multinationals (NÉOMED, CQDM, MEDTEQ).

Joint initiatives aimed at expanding the industry.

DYNAMIC LSHT POLICIES AND BUSINESS STRATEGIES
Set-up of the Work Group for Health Sciences.

Accelerating the evaluation of new drugs by INESSS.

Support for the establishment of specialized seed funds in Health Sciences, Amorchem II.

Support for the implementation of early clinical studies projects, through Early Stage Clinical Trial Initiative
WORLD-CLASS EXPERTISE AND A FRONT-RANK ENVIRONMENT

Unique R&D expertise in international areas of excellence.

One of the few cities in the world where it is possible to complete every stage of developing a new therapy.

A concentration of LSHT companies.

Access to a large patient population.

The most multilingual population in Canada.

Operating costs advantage.
HEALTH TECHNOLOGIES IN GREATER MONTREAL

«Greater Montreal provides a start-up like ours with valuable access to a network of qualified, world-renowned researchers and a pool of potential partners used to working together. It’s very exciting and vital to our growth.»

— Michelle Laflamme, President and CEO, Emovi
142 companies in Greater Montreal.

More than 5,000 direct jobs throughout Quebec.

74.8% of LSHT jobs are located in the Greater Montreal area.

R&D activities are divided into five areas of excellence: assistive devices, information technology, imaging, biomaterials and diagnostic and therapeutic devices.

Major investments from the McGill University Health Centre (MUHC) and Centre hospitalier de l’Université de Montréal (CHUM) show that the health technologies sector is the way of the future for the region.

DID YOU KNOW?

Out of all the LSHT sub-sectors, health technologies is the most active when it comes to creating new companies.

In addition to being a LSHT hub, Montreal is a hub for the technologies and communications industry, making it the ideal place to do business in the health technology field.
THE PHARMACEUTICAL SECTOR IN GREATER MONTREAL

«With the quality of the science conducted there, its infrastructures and a unique collaborative spirit, Montreal is, in proportional terms, capable of competing with key regions in life sciences.»

— Paul Lirette, President of GSK Canada
63% of the LSHT sector’s global revenues.

**34 companies** in Greater Montreal.

More than **7,200 direct jobs** throughout Quebec.

This subsector has the **greatest number of direct jobs** in the area.

In 2011, 25% of workers in the biopharmaceutical industry in Quebec **held a graduate degree** (Master’s and/or PhDs).

**DID YOU KNOW?**

Montreal is one of the few cities in the world where a company can complete **every stage of drug development**.

Many **well-known drugs** were developed in the Greater Montreal area.
BIOTECHNOLOGY IN GREATER MONTREAL

«Quebec, particularly the Montreal area, comprises almost half of all activities in the biopharmaceutical industry in Canada.»

— Yves Cornellier, President and CEO, Alethia Biothérapeutiques
36 companies in Greater Montreal.

More than 620 direct jobs throughout Quebec.

Expected annual growth of 9% worldwide from 2014 to 2018.

The city has significant office space and numerous laboratories, which allow young companies to establish themselves in a stimulating environment conducive to their growth.

DID YOU KNOW?

Montreal is the engine of genomics in Canada and home to world-renowned research centres.
CONTRACT MANUFACTURING AND RESEARCH (CRO/CMO) IN GREATER MONTREAL

«We are fortunate to belong to a complete cluster, which brings together absolutely every imaginable service company and is very competitive through collaboration between industry and government stakeholders.»

— Yves Roy, President, COREALIS Pharma
78 companies in Greater Montreal.

More than 9,000 direct jobs throughout Quebec, representing nearly 20% of all LSHT jobs.

90% of the subsector’s jobs are located in the Greater Montreal area.

Contract manufacturing and research organizations offer a full range of services, from preclinical studies to pharmacovigilance and production in accordance with Good Manufacturing Practices (GMP).

The Greater Montreal area is a major market due to its many advantages.

DID YOU KNOW?
94.7% of Quebec’s contract manufacturing organizations are located in Montreal.
RESEARCH IN GREATER MONTREAL

«If we collaborate, Greater Montreal can achieve great things and compete at a global scale in the field of clinical research.»

— Rémi Quirion, Quebec’s Chief Scientific Officer
An historic collaboration agreement between the three university hospitals of Greater Montreal reflects this region’s distinctive cross-sectoral cooperation and the vitality of the cluster.

Quebec has an outstanding track record in personalized health care. Quebec-based personalized health care researchers have been very successful when it comes to federal assistance, recently receiving 61% of all domestic subsidies from Genome Canada-CIHR Competition.

Six research areas are recognized as strong sectors for the province and the Greater Montreal

The three university hospital research centres in Montreal make the city a major research hub on a global scale.

Over 150 public and parapublic research organizations.

More than 12,000 direct jobs for researchers and professionnels.

Nearly $1.8 billion in grants and subsidies from 2006 to 2011, the highest in Canada.

20% of the total research funding budget in Canada from 2005-2010.
THE POWER TO UNITE: MONTREAL INVIVO, THE LSHT CLUSTER

Montreal InVivo, through its efforts to rally every player in Greater Montreal’s LSHT industry, takes concrete steps to bring development and growth projects to life and act as an information and reference source for political and economic decision-makers.
WHAT IS A CLUSTER?

EXCITING CHALLENGES: MONTREAL INVIVO’S AREAS OF ACTION

BUILDING A WORLD-CLASS INDUSTRY
To accelerate the transition from research to market and entrepreneurship support — primarily to enhance the cluster’s performance and international competitiveness — grow the best SMBs, attract foreign investment and recruit international-calibre researchers.

DEVELOPING EXPERTISE AND THE NEXT GENERATION
To cultivate a qualified, creative and flexible labour pool, develop, attract and retain talent and educate cluster members on the importance of succession.
FOSTERING THE INTEGRATION OF INNOVATION
To promote greater collaboration between partners and stronger ties with today’s policy makers, foster a cultural change to establish sustainable multidisciplinary partnerships and introduce initiatives to integrate innovation into the health system.

PROMOTING QUEBEC’S STRENGTHS, ASSETS AND OPPORTUNITIES
To raise the cluster’s profile and national or international trade, promote local players and the LSHT’s competitiveness.

LEVERAGING RESEARCH AND INNOVATION
Provide stronger support to the most promising research areas and increase public and private R&D funding.
MONTREAL INVIVO: MULTI-FACETED SOLUTIONS

The **Early Stage Clinical Trial Initiative**, launched in 2015, strives to make Montreal a **global centre of expertise** for early trial studies and clinical feasibility demonstrations, through the extensive mobilization of the community, including a partnership between three of the city’s university hospitals.

Launched in 2011 at the instigation of Montréal InVivo, the **Personalized Health Care Initiative (PHC)** brings together every stakeholder to **stimulate the development of personalized health care in Quebec** and promote the ideas, initiatives, practices and policies that support it.

The **NEOMED Institute**, a public-private partnership founded in 2012, provides **industrial expertise** in drug discovery and development and **funding** to bridge the gap between early-stage innovations and Quebec’s health needs.
Since 2008, the **Quebec Consortium for Drug Discovery (QCDD)** has funded advanced technology that improves the productivity of biopharmaceutical R&D and accelerates the development of safer, more effective drugs. It has also created a space for collaboration between public and private sectors.

**Mentorat BioSuccès** is a provincial mentoring network that strives to boost the success of LSHT entrepreneurs, providing the support of qualified mentors committed to sharing their experience as an entrepreneur or a leader.

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**CONSTANT UNIFYING EFFORTS**

**HOSTING OF PROMOTIONAL AND NETWORKING EVENTS** with hundreds of participants each year.

**PUBLICATION OF STUDIES AND DIRECTORIES** that support the efforts of the cluster’s members.

**PARTICIPATION IN CONSULTATIONS** to champion the LSHT sector.