



CANADA

FOCUS ON



DETAILED RESULTS FOR CANADIAN CITIES

- Detailed results are shown for 42 Canadian cities.
- To maintain balance in the international comparisons, the number of Canadian cities included in the international report was limited to 13. However, all 42 cities have been researched on a comparable basis.
- Detailed results for all cities included in the international KPMG study are available on-line at www.CompetitiveAlternatives.com.

CANADIAN VERSUS US COSTS

- Costs for Canadian cities are generally 10% to 20% lower than for their regional US counterparts.
- Overall costs in all Canadian cities are lower than in every city in the continental United States. Even higher-cost Canadian cities such as Toronto and Vancouver rank ahead of the lowest-cost continental US cities.
- Even with a 20% increase in the value of the Canadian dollar, Canada's cost advantage would still average more than 5%.

CANADIAN SPONSORS

In addition to the sponsors listed on the last page of this brochure, the following organizations also sponsored the inclusion of additional Canadian cities listed in this "Focus On Canada" brochure.

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NATIONAL RESULTS BY INDUSTRY AND OPERATION

INDUSTRY	OPERATIONS MODELED	NATIONAL INDEX AND RANK									
		AUSTRIA	FRANCE	GERMANY	ITALY	NETHERLANDS	UK	CANADA	US	JAPAN	
COMPOSITE INDUSTRIES¹											
Auto parts		91.5 (5)	91.7 (6)	101.6 (8)	87.8 (2)	89.4 (4)	87.0 (1)	89.0 (3)	100.0 (7)	121.9 (9)	
	Metal components (75%)	91.1	91.3	101.3	87.4	89.0	86.6	88.9	100.0	122.0	
	Plastic components (15%)	90.9	91.1	100.4	87.9	87.9	86.4	89.0	100.0	121.7	
	Electronic subassemblies (10%)	95.7	95.5	105.9	91.1	95.0	91.1	89.4	100.0	121.6	
Aerospace		93.0 (6)	92.3 (5)	103.6 (8)	87.4 (2)	90.6 (4)	87.2 (1)	87.8 (3)	100.0 (7)	119.8 (9)	
	Precision parts (45%)	91.2	89.8	102.7	83.9	87.5	83.9	86.0	100.0	117.5	
	Electronic subassemblies (40%)	95.7	95.5	105.9	91.1	95.0	91.1	89.4	100.0	121.6	
	Plastic components (15%)	90.9	91.1	100.4	87.9	87.9	86.4	89.0	100.0	121.7	
MANUFACTURING²											
Building products (hardware)	Metal components	91.1 (5)	91.3 (6)	101.3 (8)	87.4 (2)	89.0 (4)	86.6 (1)	88.9 (3)	100.0 (7)	122.0 (9)	
Plastics	Plastic products	90.9 (5)	91.1 (6)	100.4 (8)	87.9 (2)	87.9 (3)	86.4 (1)	89.0 (4)	100.0 (7)	121.7 (9)	
Agri-food	Food processing	93.4 (5)	94.4 (6)	99.5 (7)	91.3 (2)	92.1 (3)	90.9 (1)	92.5 (4)	100.0 (8)	109.6 (9)	
Telecom & electronics equip.	Electronics assembly	95.7 (6)	95.5 (5)	105.9 (8)	91.1 (3)	95.0 (4)	91.1 (2)	89.4 (1)	100.0 (7)	121.6 (9)	
Precision manufacturing	Precision components	91.2 (6)	89.8 (5)	102.7 (8)	83.9 (2)	87.5 (4)	83.9 (1)	86.0 (3)	100.0 (7)	117.5 (9)	
Pharmaceuticals	Pharmaceutical products	95.4 (6)	95.3 (5)	103.2 (8)	91.9 (3)	94.4 (4)	90.7 (1)	90.9 (2)	100.0 (7)	115.0 (9)	
Chemicals	Specialty chemicals	95.2 (4)	95.5 (6)	103.2 (8)	92.6 (3)	95.3 (5)	92.4 (2)	89.6 (1)	100.0 (7)	111.4 (9)	
R & D²											
Laboratory research	Biomedical R&D	84.1 (6)	82.0 (5)	97.8 (7)	80.4 (3)	82.0 (4)	78.7 (2)	72.2 (1)	100.0 (8)	124.5 (9)	
Product testing	Electronic systems dev't/testing	81.4 (6)	75.2 (5)	88.8 (7)	74.3 (3)	74.8 (4)	71.0 (2)	66.9 (1)	100.0 (8)	114.3 (9)	
SOFTWARE²											
Software design	Advanced software	93.9 (6)	91.5 (5)	99.6 (7)	89.1 (3)	90.1 (4)	82.0 (2)	77.8 (1)	100.0 (8)	108.8 (9)	
Web development	Content development	96.6 (6)	87.1 (4)	97.1 (7)	85.4 (3)	87.6 (5)	80.7 (2)	77.6 (1)	100.0 (8)	115.6 (9)	
CORPORATE SERVICES²											
Corporate services	Shared services center	111.8 (7)	104.2 (6)	123.4 (8)	91.6 (3)	100.9 (5)	90.0 (2)	80.3 (1)	100.0 (4)	154.2 (9)	
	12-operation average	93.7 (6)	92.2 (5)	101.9 (8)	88.6 (3)	90.8 (4)	86.9 (2)	85.5 (1)	100.0 (7)	117.8 (9)	

¹ Due to the more complex nature of these industries, results are calculated based on composite results for multiple operations as indicated. Weightings are based on industry research, although different approaches may give different weightings and results. As these results are based on other operations, they are not included in determining the overall, 12-operation average.

² Industries represented by a single operation.

REGION AND CITY RESULTS (12-OPERATION AVERAGE)

LOCATION	COUNTRY	OVERALL INDEX	LOCATION	COUNTRY	OVERALL INDEX	LOCATION	COUNTRY	OVERALL INDEX
CONTINENTAL EUROPE			NORTH AMERICA			MIDWEST		
1 Catania	Italy	87.2	NEW ENGLAND/ATLANTIC			1 Edmonton, AB	Canada	82.9
2 Naples	Italy	87.7	1 Halifax, NS	Canada	83.9	2 Saskatoon, SK	Canada	84.9
3 Livorno	Italy	87.9	2 Moncton, NB	Canada	84.6	3 Calgary, AB	Canada	85.0
4 Turin	Italy	88.9	3 Lewiston, ME	US	98.2	4 Winnipeg, MB	Canada	86.4
5 Vicenza	Italy	88.9	4 Burlington, VT	US	99.4	5 Sioux Falls, SD	US	96.1
6 Groningen	Netherlands	90.0	5 Hartford, CT	US	102.9	6 Cape Girardeau, MO	US	96.3
7 Mulhouse	France	90.5	SOUTHEAST			7 Salt Lake City, UT	US	97.8
8 Zwolle Region	Netherlands	90.6	1 San Juan, PR	US	87.8	8 Cedar Rapids, IA	US	97.9
9 Tilburg	Netherlands	90.7	2 Dothan, AL	US	94.3	9 Wichita, KS	US	99.0
10 Maastricht-Heerlen	Netherlands	90.9	3 Greenville-Spartanburg, SC	US	95.5	10 Colorado Springs, CO	US	99.1
11 West-Holland Region	Netherlands	91.7	4 Nashville, TN	US	97.3	11 Oklahoma City, OK	US	99.4
12 Grenoble	France	91.8	5 Jacksonville, FL	US	97.6	12 Phoenix, AZ	US	100.1
13 Linz	Austria	93.1	6 Atlanta, GA	US	98.3	13 St. Louis, MO	US	101.5
14 Graz	Austria	93.4	7 Raleigh, NC	US	98.7	14 Chicago, IL	US	101.9
15 Toulouse	France	94.2	NORTHEAST			15 Minneapolis, MN	US	102.6
16 Vienna	Austria	94.7	1 Quebec City, QC	Canada	83.5	16 Dallas-Fort Worth, TX	US	103.3
17 Chemnitz	Germany	94.8	2 Montreal, QC	Canada	85.3	17 Houston, TX	US	105.0
18 Darmstadt	Germany	104.8	3 Waterloo Region, ON	Canada	85.7	PACIFIC		
19 Dusseldorf	Germany	105.9	4 Ottawa, ON	Canada	86.2	1 Kelowna, BC	Canada	84.7
UNITED KINGDOM			5 Toronto, ON	Canada	87.9	2 Vancouver, BC	Canada	88.2
1 Telford	UK	85.4	6 Lexington, KY	US	96.9	3 Boise, ID	US	97.5
2 Stoke-on-Trent	UK	85.8	7 Indianapolis, IN	US	97.2	4 Portland, OR	US	100.8
3 Cardiff	UK	86.7	8 Columbus, OH	US	98.3	5 San Diego, CA	US	102.2
4 Plymouth	UK	86.8	9 Saginaw, MI	US	99.6	6 Las Vegas, NV	US	102.8
5 Manchester	UK	88.0	10 Northern Virginia (Metro DC), VA	US	100.8	7 Sacramento, CA	US	103.4
6 Birmingham	UK	88.6	11 Scranton, PA	US	100.8	8 Riverside-		
7 Glasgow	UK	88.8	12 Syracuse, NY	US	103.6	San Bernardino, CA	US	103.7
8 Edinburgh	UK	90.0	13 Philadelphia, PA	US	106.8	9 Seattle, WA	US	105.7
JAPAN			14 Boston, MA	US	107.6	10 San Jose, CA	US	115.5
1 Hamamatsu	Japan	113.8	15 Newark, NJ	US	110.5	11 Honolulu, HI	US	116.7
2 Fukuoka	Japan	113.9	16 New York City, NY	US	115.5			
3 Yokohama	Japan	125.7						