Great Opportunities for Smart Transportation in Greater Montréal
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10+1 reasons to invest in Greater Montréal in electric and smart transportation

1. Specialized ecosystem
   - Ground transportation expertise
   - Vehicle electrification value chain
   - A world-class hub in Artificial Intelligence

2. Affordable and clean electricity
   - One of the world’s largest producers of hydro power
   - 99%+ electricity from renewable sources
   - The lowest electricity rates among major North American cities

3. Québec’s electrification strategy
   - Ambitious targets to drive the industry forward
   - A budget of $420M
   - 5,000 new jobs by 2020

4. Proactive city
   - Smart Cities Challenge 2019 Winner
   - Smart and Digital City Office
   - Intelligent Transportation Institute

5. World-class research centres
   - IREQ, Hydro-Québec’s research institute: 800 patents and 40 licences
   - Leading artificial intelligence research
   - World recognized researchers

6. Testing areas and conditions
   - Favorable climate
   - Presence of a test center for Canadian and U.S. standards
   - Semi-controlled and real-world testing areas
   - Temporary imports of non-certified vehicles

7. Leading talent pool
   - 64,000 engineers
   - 34,000 engineering students
   - Research chairs in transportation electrification
   - Bilingual population

8. Competitive costs and incentives
   - Cost advantage over other North American cities
   - Generous R&D tax credits
   - Financial support

9. Market access
   - Direct access to 1.5B consumers due to NAFTA, CETA, CPTPP and 12 other trade agreements in force

10. Intermodal platform
    - International airports
    - The second-largest container port in Canada
    - A railway network that extends all the way to Mexico

   + Montréal International’s strategic support
01
A Booming Smart Transportation Hub
Québec’s Smart transportation ecosystem at a glance

A strong transportation manufacturing industry

A wide range of manufacturing, design and assembly activities for transportation equipment and vehicles

Québec has been developing its expertise in specialized vehicles:

- Buses, motor coaches;
- Trucks; Garbage trucks;
- Armoured cars, ambulances, police cars;
- Motorcycles, snowmobiles, three-wheeled sports vehicles.

Source: Bombardier, 2018; Québec Ground Transportation Cluster, 2017.
Greater Montréal, a smart and digital city

- **Smart Cities Challenge 2019 winner** for its proposal to improve mobility with a prize of $50M
- **2019 Electromobile City Winner from Canada Electric Mobility**
- **First among the big smart cities** - Intelligent Community Forum (2018)
- Presence of the **Smart and Digital City Office** and the **Institute of Intelligent Transportation**
- **$400M** invested into Canada’s **5G public-private ENCQOR project Network** to enable better-sustained connection and communication between technologies
- **Many ambitious Intelligent Transportation System** projects: Urban Mobility Management Center, Smart Parking Project, Geo-Traffic Dynamic Database
World-class research centres

Recognized for its expertise in batteries and R&D

- Hydro-Québec's research institute, IREQ is recognized for its expertise in batteries
- Close to 30 research groups and research centres
- 800 patents and 40 licences held by IREQ, Hydro-Québec's research institute
- Yearly average of $100M in its innovation projects
- 500 specialists pool their efforts and expertise to support Hydro-Québec in every facet of its operations, from electricity generation to consumption.

Source: IREQ, 2019.
Collaborative cluster organizations to support companies and investors

<table>
<thead>
<tr>
<th>Organization</th>
<th>Industry Focus</th>
</tr>
</thead>
<tbody>
<tr>
<td>propulsion Québec</td>
<td>Electric and smart vehicles</td>
</tr>
<tr>
<td>CARGO</td>
<td>Transport and logistics</td>
</tr>
<tr>
<td>écotech Québec</td>
<td>Clean technologies</td>
</tr>
<tr>
<td>techno MONTREAL</td>
<td>Information and communications technologies</td>
</tr>
<tr>
<td>Pôle</td>
<td>Ground transportation</td>
</tr>
<tr>
<td>Mila</td>
<td>Artificial Intelligence</td>
</tr>
<tr>
<td>scale .ai</td>
<td>AI-Powered Supply Chains</td>
</tr>
</tbody>
</table>
Established local and global players thriving in Greater Montréal

**Johnson Matthey**
Production of lithium iron phosphate (LiFePO4) for Lithium-Ion batteries to meet North American demand.

**Blue Solutions**
A company specializing in energy and automation technologies and opening a North American centre of excellence for transportation infrastructure in Montréal.

**TM4**
A company designing motors and power converters.

**AddÉnergie**
1st in Canada and 2nd in North America in charging solutions for electric vehicles. It will provide New York City with charging stations for electric vehicles.

**Varitron**
One of the top five electronic manufacturing services companies in Canada.

**Verbom**
A leading manufacturer of sheet metal parts for the transportation industry.

**ABB**
A company specializing in energy and automation technologies and opening a North American centre of excellence for transportation infrastructure in Montréal.

**Lion Bus**
A Québec-based OEM that caters to the needs of the North American school bus industry.

Source: Hydro-Québec, 2018; Blue Solutions, 2018; TM4, 2018; Varitron, 2018; Verbom, 2018; Lion Bus, 2018; Radio-Canada, 2019.
A culture of partnerships and commitment

Dana Incorporated and Hydro-Québec announced a strategic joint-venture in which TM4 Inc., a subsidiary of Hydro-Québec, will become Dana’s source for electric motors, power inverters, and control systems. (2018)

Michelin acquires Camso and strengthens its position in the manufacture of specialty tires and tracks for off-road vehicles (2018)

Kéolis launches the first NAVYA autonomous shuttle on the roads of Quebec (2018)

PSA (FreetoMove) invests in Communauto to eventually provide car-sharing vehicles, thus preparing for its eventual return to the North American market (2016)

Daimler and Blue Solutions a subsidiary of Bolloré, enter into an agreement to equip Daimler’s E-Citaro buses with Lithium Metal Polymer (LMP®) batteries from Blue Solutions, exclusive supplier of full solid batteries for electric buses (2018)

Mobilizing project between Lion Bus, TM4, AddÉnergie Technologies, Adetel Solution and Alcoa Canada from electric heavy-duty vehicles prototypes (2016) to launching of All-Electric Class 8 Urban Truck (2019)

Source: Hydro-Québec, 2018; Keolis, 2018; Blue Solutions, 2018; TM4, 2018; Camso, 2018; Communauto, 2016; Autobus Lion, 2019.
Political momentum for the industry

Québec

- 2015-2020 Transportation Electrification Strategy
  - A budget of over $420M and 35 measures, including $86.5M to develop the industry
- Other government strategies that will have a positive impact on the transportation sector:
  - Sustainable Development Strategy (2015–2020)
  - Maritime Strategy (until 2030)
  - Aerospace Strategy (2016–2026)
  - Digital Strategy (effective 2017)
  - Plan Nord 2015-2035
  - Energy Policy 2030

Montréal

- 2016–2020 Transportation Electrification Strategy
  - Institut de l’électrification et des transports intelligents (Institute for Electrification and Smart Transportation)
  - Planned urban test corridor in a real-world setting
  - Assessment of the feasibility of an urban distribution centre for last-mile deliveries using small electric vehicles

IVÉO

- IVÉO, dedicated to real-world experimentation of new technologies in the field of smart and sustainable transport for small and medium cities, such as: Boucherville, Brossard, Candiac, Deux-Montagnes, Granby, Hampstead, Lac Mégantic, La Prairie, L'Assomption, Longueuil, Sherbrooke, etc.

Québec's transportation electrification strategy

2020 Targets
- Create 5,000 jobs in the electric vehicle industry
- Provide $500M to stimulate investments
- Reach the mark of 100,000 plug-in hybrids and electric vehicles registered in Québec
- Reduce annual GHG emissions from transportation by 150,000 tonnes
- Reduce annual fuel consumption in Québec by 66 million litres
Transportation stands on a strong IT industry

- 107,500 qualified employees in IT, and 5,240 companies
- A GDP of $11.6B
- Lowest operating costs in North America for software development, ahead of Toronto, Boston, New York, and San Francisco
- Broadly diversified industry:

  1. 5th highest tech jobs concentration among the largest metropolitan areas in Canada & U.S.
  2. 1st in Canada and a world leader in VFX & animation
  3. 5th video game development hub in the world

Building transportation with AI

- **Over $2 billion in AI investments** announced in Greater Montréal since 2016
- The Canadian government chose Montréal as the headquarters for **SCALE AI**, Canada’s AI supply chain super cluster
- All major players present and a thriving community aiming for a better world

Source: MILA; Montréal International Analysis.
Made-in-Québec electric vehicles

**BOMBARDIER RECREATIONAL PRODUCTS (BRP)**
A new, fully electric Spyder with a 170-km range. 70% of BRP recreational products are exported to the U.S.

**LION BUS**
The first OEM to sell a fully electric school bus. Its vehicles are also available in California, Massachusetts and New York.

**NOVABUS**
Volvo is making the most of Greater Montréal’s position as the only centre of expertise in transportation electrification in North America.

**BOMBARDIER-ALSTOM**

**POSI**

**MOVERA**
An iconic shuttle vehicle developed by a consortium for Calgary International Airport.

**KARGO**
A vehicle that is 90% aluminum. 30% of all vehicles produced go to mines outside North America.

**LITOGREEN MOTION**

**DOPPELMAYR**

**PACCAR**
A culture of innovative, sustainable urban mobility

Société de transport de Montréal (STM) planning to go fully electric
- Ranked 9th in the 2018 Best 50 Corporate Citizens in Canada
- Goals: acquire only electric vehicles as of 2025 and achieve zero emissions for vehicles by 2040

Réseau Express Métropolitain (REM) is a light rail network under construction in Greater Montréal
- 67 km, with 26 stations
- Initiated by Caisse de dépôt et placement du Québec (CDPQ Infra) for an estimated investment of $6.3B

Communauto, one of the largest companies of its kind in the world, and North America’s car-sharing pioneer
- 3,000 vehicles
- A fleet including hybrid and electric cars
- Serves 13 Canadian cities and Paris in France

BIXI, the bike sharing system that has taken over the world
- 7,250 bikes and 600 stations in Montréal
- Urban mobility and environmental responsibility
- A system used in 33 cities around the world: NYC, London, Chicago, Toronto, Barcelona, Sao Paulo, etc.

Source: Société de Transport de Montréal, 2019; 2018 Best 50 Corporate Citizens in Canada, Corporate Knights; CDPQ Infra, 2019; Communauto, 2019; BIXI Montréal, 2019; PBSC Urban Solutions, 2019.
All the Building Blocks for the Future of Mobility
Clean, renewable, reliable and affordable electricity

1st place
in North America for the lowest
Electricity prices for large-power customers

Total installed capacity
of 47 222 MW

With its rich renewable, green and stable supply of low-cost hydropower, Greater Montréal boasts one of the lowest electricity rates in North America: CA¢3.98/kwh*

* Rate LG: large power with minimum billing demand of 5,000 kW, transmission and distribution included, for 120-kV supply with 95% load factor, and including the Economic Development Rate reduction (if eligible).

- **Stable electricity rates**: Thanks to the collective wealth represented by our water resource, the rates are not subject to the volatility of oil and gas prices
- Hydro-Québec generates more than 99% of clean, renewable energy
- The quality and reliability of the power grid are also two major advantages

Note: Estimations by Hydro-Québec are based on a monthly consumption of 10,000 kWh, a power demand of 40 kW and a 35% load factor. Source: Hydro-Québec, 2019.
Favorable conditions for vehicle testing

Québec’s weather is perfect for testing
- Harsh winter conditions
- Heavy precipitation and wide temperature variations

One of the most modern motor vehicle test centres (MVTC)
- Transport Canada’s only motor vehicle test and research centre; run by PMG Technologies
- The only Canadian motor vehicle test centre and one of the few in North America that conducts testing to Canadian and U.S. standards (CMVSS and FMVSS)
- Test vehicle preparation lab and crash lab
- 25 km (15.5 mi.) of test tracks and proving grounds
- Environmental chambers for tests at temperatures ranging between −55°C and +85°C

Dedicated organisms for the experimentation of new technologies in the field of smart and sustainable transport

Source: PMG Technologies, 2019; City of Montréal, 2019; IVÉO, 2019.
Abundant natural resources needed for battery production

Geological diversity
- Availability of **metals needed** to manufacture batteries and special alloys for lighter vehicles
- **Lithium, graphite, titanium, phosphate, cobalt, niobium and vanadium reserves**
- **3rd world lithium deposit** is in Québec

Global aluminum producer
- **Nine aluminum smelters** in Québec, with a production capacity of 2.9 million tonnes
- Canada, the **world's third-largest producer** of primary aluminum, 90% of which is produced in Québec
- The major producers are **Rio Tinto** and **Alcoa**
- **Aluminum processors serving the transportation industry:**
  - Bombardier (metro) • Fabrication Powercast (mold cast parts)
  - Fourgons Transit (truck bodies) • Cambli Group (armoured trucks)
  - Tremcar (tank trailers) • Remtecc (special vehicles/tanks) • Raufoss (formed aluminum products)
  - Équipements Labrie Manac (waste collection equipment)

Source: Propulsion Québec, 2019; AluQuébec, 2019; Natural Resources Canada, 2019; MEI, 2018.
03
A Strategic Market Access
A gateway to 70% of the world’s GDP

Thanks to NAFTA, CETA, CPTPP and 12 other free trade agreements in force*

Direct access to 1.5 billion wealthy consumers and a combined GDP of US$55 trillion (70% of the world’s output of goods and services)

Only Canada has free trade agreements with all G7 countries

No tariffs on steel and aluminum products

*North American Free Trade Agreement (NAFTA), Comprehensive Economic and Trade Agreement (CETA) and Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP)

A true logistics and intermodal hub

- **Two international airports**: Montréal–Trudeau and Montréal–Mirabel
- **19.4M passengers** in 2018 (+6.9%)
- Direct flights from Montréal–Trudeau airport to **more than 150 destinations**, including 119 international destinations

- **The 2nd largest port** in Canada and 1st **container port** in Eastern Canada
- Dubbed the port for Québec and Ontario shippers
- More than 2,700 ships/year, 2,500 trucks/day and 60–80 trains/week
- Access to 40M consumers in **one day by truck** and 70M consumers in **less than two days by train**

A rail network that extends across Canada and the U.S. all the way to Mexico:
- **Canadian National Railway Company (CN)**
  - Headquarters located in Montréal. Tracks stretching across Canada from the Atlantic to the Pacific coast and following the Mississippi River all the way to the Gulf of Mexico
- **Canadian Pacific Railway (CP)**
  - 22,500 km of track in 6 Canadian provinces and 13 U.S. states
- **CSX**
  - More than 34,000 km of track in 23 U.S. states, the District of Columbia, Ontario and Québec

Source: Aéroports de Montréal, 2019; Port de Montréal, 2018; MESI, Profil de l’industrie des équipements ferroviaires au Québec, 2010; CSX, 2018; Railway Association of Canada, 2018; Transport Canada, 2012.
A Deep and Growing Pool of Highly Qualified Talent
The best student city in the Americas and Canada's university capital

- **Canada's university capital**: 11 university institutions and 60 colleges
- **320,000 post-secondary students**, including 201,000 university students and 35,500 international university students
- More than $1B in funding dedicated to university research
- **Best student city in the Americas:**

<table>
<thead>
<tr>
<th>Rank</th>
<th>City</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Montréal</td>
</tr>
<tr>
<td>2</td>
<td>Boston</td>
</tr>
<tr>
<td>3</td>
<td>Toronto</td>
</tr>
<tr>
<td>4</td>
<td>Vancouver</td>
</tr>
<tr>
<td>5</td>
<td>New York</td>
</tr>
</tbody>
</table>

The metropolitan area with the most bilingual and trilingual population in Canada

- 2.5 million residents speak English, that’s 9% more than in Vancouver
- 55% of the population is bilingual (English and French), compared to 8% in Toronto and 7% in Vancouver
- Almost 20% of the population is fluent in three or more languages compared to 4% in Toronto and 3% in Vancouver

The engineering advantage

Top-ranked mobility engineering programs

- 1st in Québec for the number of students and the scope of research activities
- 120 programs, 20 Industrial Chairs (including 13 NSERC), 25 Canada Research Chairs and 1 Canada Excellence Research Chair
- 10,700 students, including 2,800 graduate students
- $27.2M in R&D research funds
- 60% of research activities carried out in partnership with the industry

Highly ranked electrical engineering and software engineering departments
- A Canada Research Chair in Efficient Electric Vehicles with Hybridized Energy Storage Systems
- World recognized laboratory on Intelligent Vehicles

A Canada Research Chair in Energy Sources for the Vehicles of the Future

A new electric vehicle technology program
- A new mechanical program for buses and electric vehicles in collaboration with the Saint-Jérôme Road Transport Training Center

Source: Ministère de l’Éducation et de l’Enseignement supérieur, 2018; Data compiled by Montréal International; Ordre des ingénieurs du Québec, 2018; ÉTS, 2018; Université de Sherbrooke, 2018; Polytechnique, 2018; Cégep de Saint-Jérôme, 2018.
University research expertise in electric and smart transportation

JOAO PEDRO FERNANDEZ
Université de Sherbrooke
Canada Research Chair in Efficient Electric Vehicles with Hybridized Energy Storage Systems
Efficiency and driving range of electric vehicles by improving their energy storage capacity

RENÉ JR. LANDRY
École de Technologie Supérieure
LASSENA (Laboratory of Space Technologies, Embedded Systems, Navigation and Avionic)
Applications in electronics and transportation such as autonomous vehicles (UAVs), software defined radio, robust systems and high-precision navigational and reliable, secure wireless communication

LOIC BOULON
Université du Québec à Trois Rivières
Canada Research Chair in Energy Sources for the Vehicles of the Future
Designing clean, efficient energy sources for vehicles

YOUMIN ZHANG
Concordia University
Networked Autonomous Vehicles (NAV) Lab
Advanced technologies for autonomous vehicles (FDD System, System FTC, Sense & Avoid)

MIGUEL ANJOS
Polytechnique Montréal
Canada Research Chair in Discrete Nonlinear Optimization in Engineering
Optimization methods that make the best use of renewable sources of energy and smoothly run the electricity smart grid

BENOÎT BOULET
McGill University
Industrial Automation Lab, Centre for Intelligent Machines
Design and control of electric vehicle drivetrains and green energy systems
University research expertise in electric and smart transportation

MAAROUF SAAD
École de Technologie Supérieure
Groupe de recherche en électronique de puissance et commande industrielle (GRÉPCI)
Applications in mobile robotics (hardware infrastructure, trajectory generation algorithms, electrical circuits)

CATHÉRINE MORENCY
Polytechnique Montréal
Canada Research Chair on personal mobility
Chaire de recherche (industrielle) MOBILITÉ
Transportation engineering: Interactions between urban travel behaviour and spatial dynamics, Spatial data analysis methods applied to urban microdata

KE WU
Polytechnique Montréal
Advanced Research Centre In Microwaves And Space Electronics (Poly-grames)
Electronic materials and components, Energy conversion and distribution, Wireless communication systems

ANDRÉA LODDI
Polytechnique Montréal
Canada Excellence Research Chair in Data Science for Real-time Decision making
Models and algorithms for quickly and efficiently processing large amounts of data from multiple sources eg. electricity market, rail transportation logistics and health care planning

JÉRÔME LE NY
Polytechnique Montréal
Mobile Robotics And Autonomous Systems Laboratory
Autonomous systems and mobile robotics, Navigation systems, Design and verification of networked, distributed and embedded control systems
05
Competitive Operating Costs and Incentives
Lowest operating costs for the smart transportation industry

**Greater Montréal’s cost advantage**
In six sectors related to the smart transportation industry (%)
Compared to four other North American metropolitan areas,* 2019

<table>
<thead>
<tr>
<th>Sector</th>
<th>Cost Advantage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automotive OEM manufacturing plant</td>
<td>20%</td>
</tr>
<tr>
<td>Auto components manufacturing plant</td>
<td>20%</td>
</tr>
<tr>
<td>Transport Technologies R&amp;D centre</td>
<td>26%</td>
</tr>
<tr>
<td>Automotive R&amp;D centre</td>
<td>26%</td>
</tr>
<tr>
<td>Software development</td>
<td>27%</td>
</tr>
</tbody>
</table>

Business operating costs are lower in Greater Montréal:

- Montréal has a **24% cost advantage** over the following four North American metropolitan areas: Austin (TX), Columbus (OH), Detroit (MI) and San Francisco (CA)

- **A cost model developed by fDi Benchmark** to compare operating costs for different locations and types of businesses (labour, property and utility costs)

Source: fDi Benchmark, 2019.

* The four metropolitan areas are Austin (TX), Columbus (OH), Detroit (MI) and San Francisco (CA). Exchange rate 20.05.2019: 1.3635 CAD per USD
## Most competitive salaries

<table>
<thead>
<tr>
<th>Professional Role</th>
<th>Montréal</th>
<th>Columbus (OH)</th>
<th>Austin (TX)</th>
<th>Detroit (MI)</th>
<th>San Francisco (CA)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electrical Engineer</td>
<td>$70,007</td>
<td>$95,226</td>
<td>$103,820</td>
<td>$102,982</td>
<td>$120,657</td>
</tr>
<tr>
<td>Electrical Engineering Technician</td>
<td>$49,240</td>
<td>$62,466</td>
<td>$65,376</td>
<td>$67,108</td>
<td>$78,670</td>
</tr>
<tr>
<td>Automotive Engineer</td>
<td>$63,908</td>
<td>$83,863</td>
<td>$90,902</td>
<td>$91,183</td>
<td>$106,229</td>
</tr>
<tr>
<td>Software Developer</td>
<td>$69,650</td>
<td>$96,907</td>
<td>$99,723</td>
<td>$99,125</td>
<td>$121,991</td>
</tr>
<tr>
<td>Manager (Manufacturing)</td>
<td>$68,506</td>
<td>$94,265</td>
<td>$98,805</td>
<td>$99,304</td>
<td>$121,635</td>
</tr>
<tr>
<td>R&amp;D Manager (Technical)</td>
<td>$88,593</td>
<td>$126,350</td>
<td>$132,757</td>
<td>$132,479</td>
<td>$160,976</td>
</tr>
</tbody>
</table>

*Medium base annual salaries for six typical professions for five major North American cities, 2019.*

Funding for the smart transportation industry

**Partnership-building transportation electrification projects**
- Intended to encourage universities, public research centres and SMEs to work together by providing funding for the development of innovative products and processes

**Strategic Innovation Fund (SIF)**
- Repayable or non-repayable contributions up to 50% of eligible costs for projects up to $500M
- All industrial and technological sectors to support innovation

**ESSOR (innovative manufacturer)**
- Refundable (interest-free & low interest loans) and non-refundable contributions
- Up to 15% of the capitalizable expenses

Programs that foster innovation

Scientific research and experimental development (SR&ED) tax credit program
  - A 15% tax credit from the Government of Canada and a 14% refundable tax credit from the Government of Québec

InnoVÉÉ/PROMPT
  - Calls for projects and grants for R&D collaborative projects involving at least one academic partner and one industry partner
  - Subsidies that could cover up to 40% of eligible expenses and combinable with federal programs
  - Examples of funded projects:
    - Development of a range extender for industrial electric vehicles
    - Development of a navigation system for electric vehicles (off-road)

INNOV-R
  - Dedicated to projects reducing GHG emissions in Québec
  - Funds up to 50% of eligible expenses for partnerships that include at least:
    - a company established in Québec, a university, a CCTT or a public research center
  - By combining programs with other funding programs (such as NSERC, etc.), up to 90% of eligible expenditures can be covered by public funding

Montréal International’s Personalized, Free and Confidential Services
Montréal International, a single contact point for a series of personalized, free and confidential services

- Long-term strategic support
- Economic data and communications services
- Government relations facilitation
- Incentive programs assistance
- Foreign workers immigration assistance
- International recruiting missions
Contact us

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