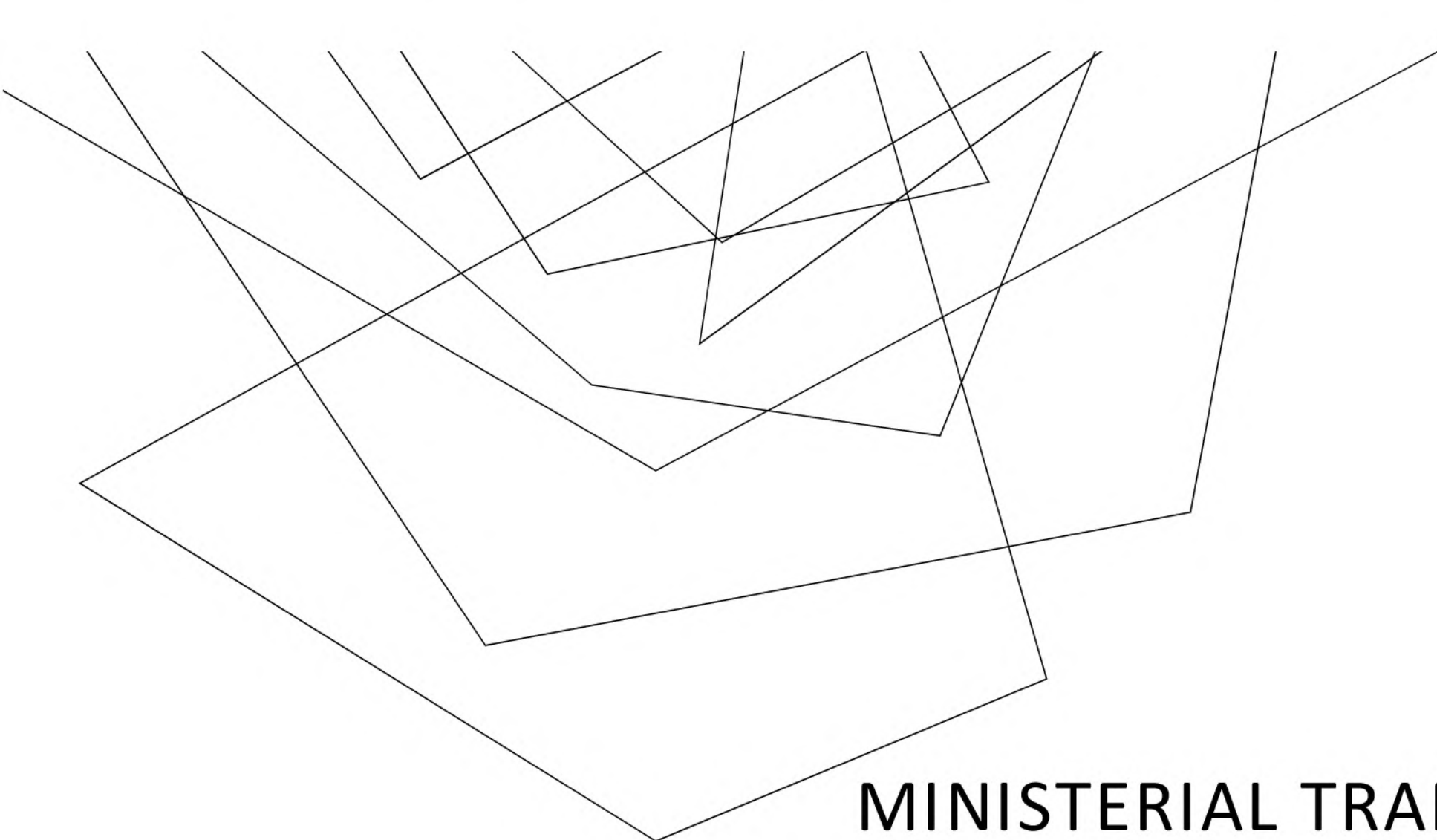




MINISTERIAL TRANSITION BOOK OCTOBER 2021

MINISTER OF TOURISM AND ASSOCIATE
MINISTER OF FINANCE



Innovation, Science and
Economic Development Canada

Innovation, Sciences et
Développement économique Canada

TABLE OF CONTENTS

1. WELCOME MINISTER



2. GETTING STARTED: THE FUNDAMENTALS

Mandate of the ISED Portfolio

Structure of the ISED Portfolio

Biographies of the ISED Deputy Ministers



3. OVERVIEW OF ACTIVITIES IN SUPPORT OF THE TOURISM SECTOR



4. OVERVIEW OF CURRENT ISED PORTFOLIO ACTIVITIES IN SUPPORT OF THE ECONOMY

The ISED and Portfolio Story

Overview of Current ISED and Portfolio Activities

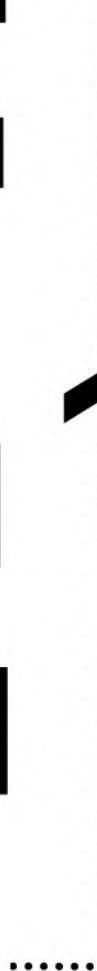
Overview of Mandate-Linked Activities

Responding to the COVID-19 Pandemic

Supporting Canadian Sectors

Helping Small Businesses Adapt, Thrive, and Scale

Regional Development



5. OVERVIEW OF ISED

Departmental Divisions



6. CANADIAN ECONOMIC SNAPSHOT

Canadian Economic Snapshot

Regional Economic Snapshot



7. STRATEGIC COMMUNICATIONS AND MARKETING

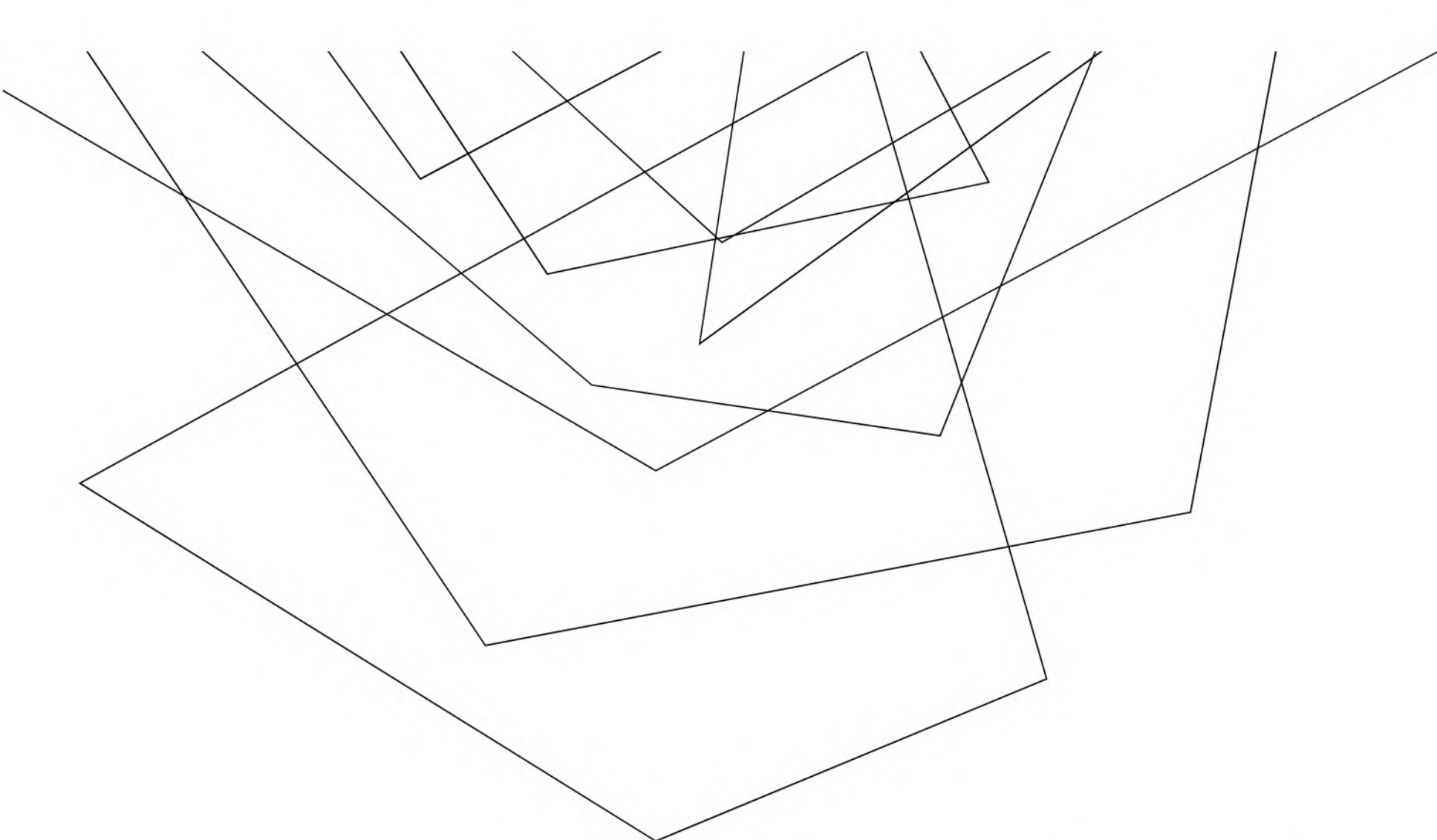
ANNEX A: OVERVIEW OF PORTFOLIO BODIES WITH KEY LINKAGES TO YOUR MANDATE

ANNEX B: DEPARTMENTAL SERVICES AND SUPPORTS

ANNEX C: LIST OF COMMONLY USED ACRONYMS



RETURN TO TABLE OF CONTENTS ICON
Found top right corner of all title slides



WELCOME MINISTER



Innovation, Science and
Economic Development Canada

Innovation, Sciences et
Développement économique Canada



WELCOME MINISTER

Congratulations on your appointment and welcome as the new **Minister of Tourism and Associate Minister of Finance**.

As Minister, you have an important responsibility to support and champion the interests of Canadian tourism businesses and the communities they support, to position Canada for success in a changed, and ever-changing, global economy. You are representing Canadians and Canadian businesses that make up and depend on the tourism industry at a time when government action is central to mitigating the extraordinary economic impacts of the COVID-19 pandemic on businesses and citizens, and positioning Canada and the Canadian economy to be more resilient, digitally-enabled, and green.

Here to support your mandate are **the Department of Innovation, Science and Economic Development (ISED)** and **Destination Canada**, a Crown corporation that helps the Canadian tourism industry reach domestic and international markets. Both organizations are working together to help build and sustain a vibrant tourism industry and position Canada as a desirable tourism destination. Given the horizontal nature of your tourism mandate, the ISED team will also assist you in building and maintaining strong connections with other federal departments and agencies, such as the **Regional Development Agencies (RDAs), Transport Canada, Parks Canada, and the Canada Border Services Agency**.

As Deputy Minister, I will assist in providing integrated lines of advice from across the Portfolio. ISED and the Portfolio support four ministers, who jointly work to support economic growth across Canada, for all Canadians and Canadian firms.

ISED will work with the **Department of Finance** to provide you support in carrying out your mandate.



WELCOME MINISTER (CONT'D)

In the context of the global COVID-19 pandemic, ISED and the Portfolio acted to support the needs of Canadians and Canadian firms to deal with the unprecedented public health and economic impacts of the pandemic. ISED and the Portfolio realigned departmental efforts to help Canadians and Canadian firms. This included work to support hard-hit sectors, including the tourism sector through the **Tourism Relief Fund** (administered by the Regional Development Agencies), with a **national priorities envelope and new funding** for Destination Canada. Efforts continue on relief measures, in particular to support hard-hit businesses, as was demonstrated through the recent announcement of extended supports for these firms.

On April 19, 2021 the government delivered a major Budget which included over \$20B in new funding for ISED and its portfolio organizations. This included significant new funding to further support economic recovery for Canadians and Canadian businesses, including the hard-hit tourism industry. The Budget announced new funding not only for a Tourism Relief Fund, but also to support **festivals and events** and Destination Canada **marketing programs**. Work is ongoing to advance and deliver on initiatives announced in Budget 2021.



WELCOME MINISTER (CONT'D)

The election platform outlined commitments to support a more resilient economy and continuing to support hard-hit sectors such as tourism. We look forward to working with you to support you to achieve your priorities in driving growth for the Canadian tourism industry.

The following package is designed to provide you with an overview of ISED and the Portfolio's organizational structure and diverse work related to your mandate. We look forward to briefing you on specific issues and files concerning programming to support the tourism industry in the coming days and weeks.

ISED and the Portfolio wish you the very best as you embark on your role, and stand ready to help advance the Government's mandate and support your vision for a prosperous future for Canada's tourism sector.

As your Deputy Head, I welcome you to your new role and offer the full support of the Department and the entire Portfolio.

Simon Kennedy
Deputy Minister



GETTING STARTED: THE FUNDAMENTALS





PURPOSE

OVERVIEW

Provide an overview of the mandate and structure of the Portfolio

PARTNERS

Provide a brief overview of portfolio heads and mandates



RAISON D'ÊTRE

Innovation, Science and Economic Development Canada (ISED) and the Portfolio work with Canadians in all areas of the economy and in all parts of the country to improve conditions for investment, enhance Canada's innovation performance, increase Canada's share of global trade, and build a fair, efficient, and competitive marketplace.

MANDATE

ISED is responsible for the government's micro-economic policy agenda, aiming to foster a growing, competitive, and knowledge-based Canadian economy. It helps create the conditions for Canadian businesses to grow, innovate, and expand so they can create jobs and wealth for Canadians. It also supports scientific research and the integration of scientific considerations into investment and policy choices, and helps small businesses grow through trade and innovation and promotes increased tourism in Canada.

LEADERSHIP

ISED is the federal institution that forms the core of the Innovation, Science and Economic Development Portfolio.

MANDATE OF ISED AND
THE PORTFOLIO



STRUCTURE OF THE ISED PORTFOLIO

DEPARTMENT

Ministers are accountable to the Prime Minister and Parliament for all organizations in their portfolio, including policy, program, and management issues

**Innovation, Science and
Economic Development
(supporting all ISED Ministers)**

AGENCIES

Statistics Canada

Canadian Space Agency

OUTSIDE PORTFOLIO:

**REGIONAL DEVELOPMENT AGENCIES
(under separate ministers)**

Atlantic Canada Opportunities Agency

Canada Economic Development for Quebec
Regions

Federal Economic Development Agency for
Northern Ontario

Federal Economic Development Agency for
Southern Ontario

Prairies Economic Development Canada

Pacific Economic Development Canada

Canadian Northern Economic Development Agency

CROWN CORPORATIONS

Independent;
Chairperson of Board
reports to Minister

Destination Canada

**Standards Council of
Canada**

**Business Development
Bank of Canada**

COUNCILS

Specialized; Deputy Head
reports to Minister

**Natural Sciences and
Engineering Research
Council of Canada**

**National Research
Council Canada**

**Social Sciences and
Humanities
Research Council of Canada**

QUASI-JUDICIAL TRIBUNALS

Make decisions and hear
appeals at arm's length from the
government following
quasi-judicial processes

Competition Tribunal

Copyright Board Canada

QUASI-JUDICIAL TRIBUNAL ADMINISTERED THROUGH OTHER PORTFOLIO

Organization responsible for the
implementation of objectives set
out in the *Telecommunications Act*

**Canadian Radio-television and
Telecommunications Commission**

ASSOCIATED ORGANIZATIONS

Government selects board
member(s); in whole or
part funded by ISED
agreement

Canada Foundation for
Innovation

Council of Canadian
Academies

Pierre Elliott Trudeau
Foundation

Sustainable Development
Technology Canada

Genome Canada*

*Minister does not
appoint board
members



BIOGRAPHIES OF THE ISED DEPUTY MINISTERS



SIMON KENNEDY

Deputy Minister, Innovation, Science and Economic Development Canada

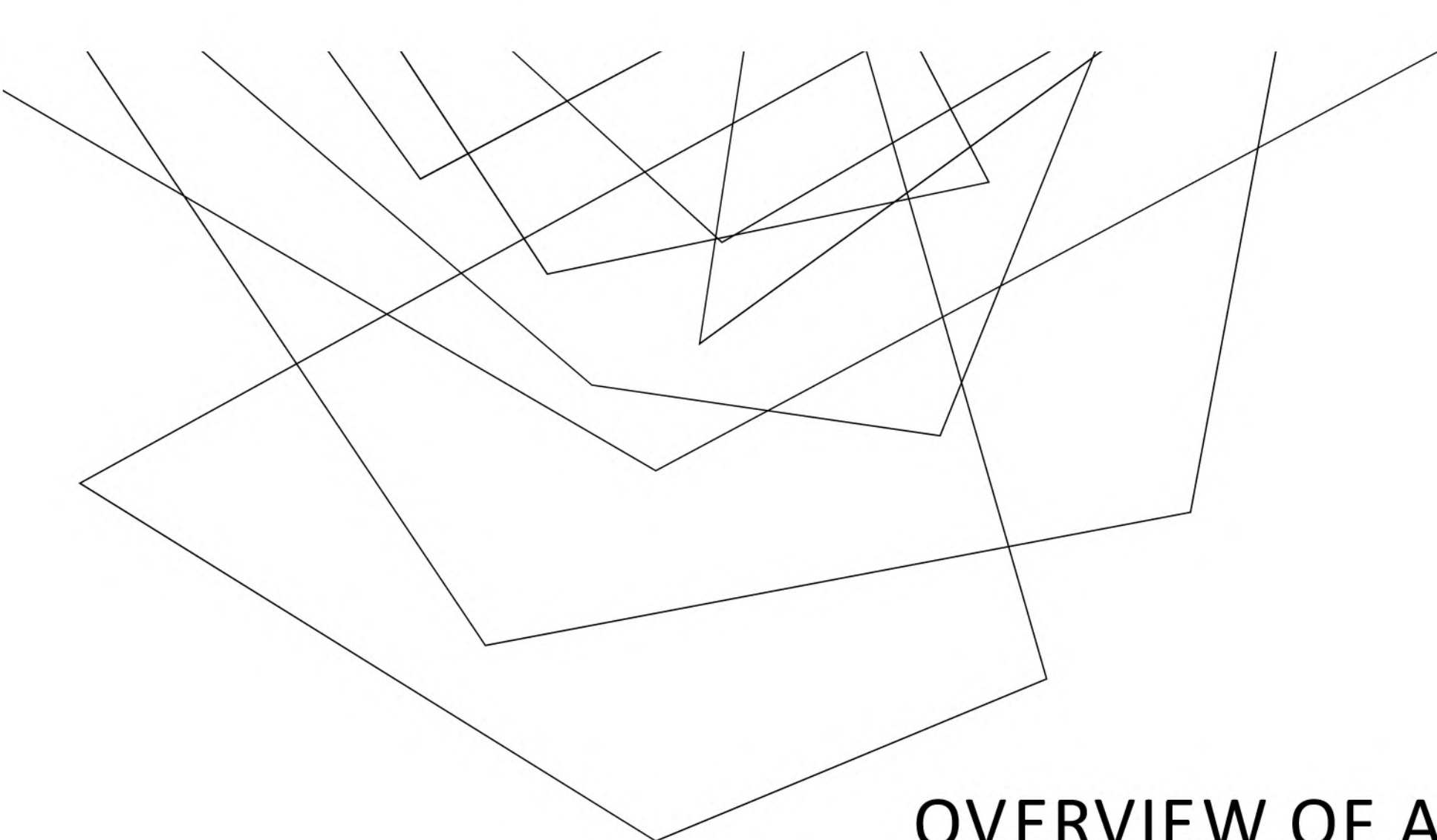
Simon Kennedy was appointed Deputy Minister of Innovation, Science and Economic Development in September 2019. Previously, Simon had served as Deputy Minister of Health. Mr. Kennedy began his career with the public service in 1990 and has served in a variety of senior roles in seven different organizations, including in six deputy minister-level appointments at the Privy Council Office, Industry Canada (as ISED was formerly known), Foreign Affairs and International Trade Canada, Health Canada, and now ISED.



PAUL THOMPSON

Associate Deputy Minister, Innovation, Science and Economic Development Canada

Paul Thompson was appointed Associate Deputy Minister of Innovation, Science and Economic Development in November 2017. Previously, Paul was the Senior Assistant Deputy Minister, Skills and Employment Branch, at Employment and Social Development Canada. He has held a variety of senior leadership roles in six different organizations across the federal public service, including Service Canada, the Treasury Board of Canada Secretariat, the Privy Council Office, Fisheries and Oceans Canada, Employment and Social Development Canada, and now ISED.

A series of thin, black, overlapping geometric lines forming various polygons and shapes, primarily located in the upper left and center of the page.

OVERVIEW OF ACTIVITIES IN SUPPORT OF THE TOURISM SECTOR





TOURISM IS AN UMBRELLA SECTOR COMPRISED OF FIVE INDUSTRIES

Transportation

Largest industry share of
tourism GDP (27.5%)

Revenues: \$40.3B
Jobs: 80,325

Accommodation

Short-term rentals are disrupting
the industry

Revenues: \$15.6B
Jobs: 140,525

Food and Beverage

Greatest share of jobs (33%) in
sector

Revenues: \$16.1B
Jobs: 228,300

Recreation and Entertainment / Travel Services

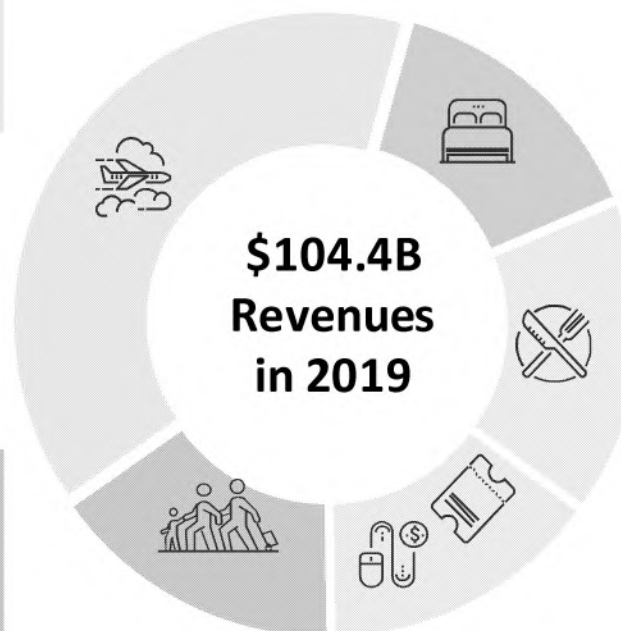
Catalyst for tourism / Significantly
disrupted by digital economy

Revenues: \$16.9B
Jobs: 112,975

Other Industries

Large number of firms in a
broad range of industries
(e.g., retail, fuel sales,
publishing)

Revenues: \$15.4B
Jobs: 129,825





ALL LEVELS OF GOVERNMENT HAVE A ROLE

FEDERAL:

- Destination Canada – Destination marketing (country tourism brand)
- Canadian Heritage and Parks Canada – own/operate tourism assets (national parks, museums) and fund festivals & events
- Transport Canada - Air policy
- Immigration, Refugees and Citizenship Canada - Visa policy
- Regional Development Agencies – Investment in tourism product
- Other (infrastructure, border policy, etc.)

PROVINCIAL/TERRITORIAL:

- Destination marketing (provincial/territorial brands)
- Product and destination development
- Hospitality and tourism education
- Regulations (accommodations; travel agencies, etc.)

MUNICIPAL:

- Destination marketing (city brand)
- Festivals, business conventions, and events

Current mechanisms for inter-governmental collaboration include the **Canadian Council of Tourism Ministers**, which you currently co-chair with the Minister of Tourism for Quebec.



PROGRAM LEVERS FOR TOURISM SUPPORT

Tourism Branch

Develops tourism policy and guides implementation of federal tourism strategies, such as the *Federal Tourism Growth Strategy*.

Oversees horizontal coordination between federal departments and other levels of government

Works with key industry stakeholders, including:

- Tourism Industry Association of Canada
- Tourism HR Canada
- Indigenous Tourism Association of Canada
- Restaurants Canada
- Hotel Association of Canada

Destination Canada (Crown corporation)

Mandate (as per the *Canadian Tourism Commission Act*):

- Sustain a vibrant and profitable tourism industry;
- Market Canada as a desirable tourism destination;
- Support a cooperative relationship between the private sector and the Government of Canada, the provinces and territories with respect to Canadian tourism; and,
- Provide information on the Canadian tourism sector to stakeholders.

Traditionally focused on marketing, but mandate does not prevent broader business lines (e.g., destination development).

Focused on 10 high-yielding markets: US, UK, France, Germany, Australia, India, China, South Korea, Mexico, and Japan.

Regional Development Agencies

Now formally outside the Portfolio and led by separate ministers, the Regional Development Agencies are responsible for the delivery of the Tourism Relief Fund and other programming.



SUPPORTING THE ECONOMIC RECOVERY OF THE TOURISM SECTOR

LIQUIDITY

- The sector received \$15.4B through core liquidity programs, such as the **Canada Emergency Wage Subsidy**, and the **Commercial Rent Subsidy and Lockdown Support** (Department of Finance).
- **Highly Affected Sectors Credit Availability Program (HASCAP)** was created to help the hardest-hit sectors, including tourism (ISED, Minister of International Trade, Export Promotion, Small Business and Economic Development).
- 25% of the \$2B **Regional Relief and Recovery Fund** was earmarked for tourism (Regional Development Agencies (RDAs), now formally outside the Portfolio and led by separate ministers).



SUPPORTING THE ECONOMIC RECOVERY OF THE TOURISM SECTOR (CONT'D)

SECTOR-SPECIFIC INVESTMENTS

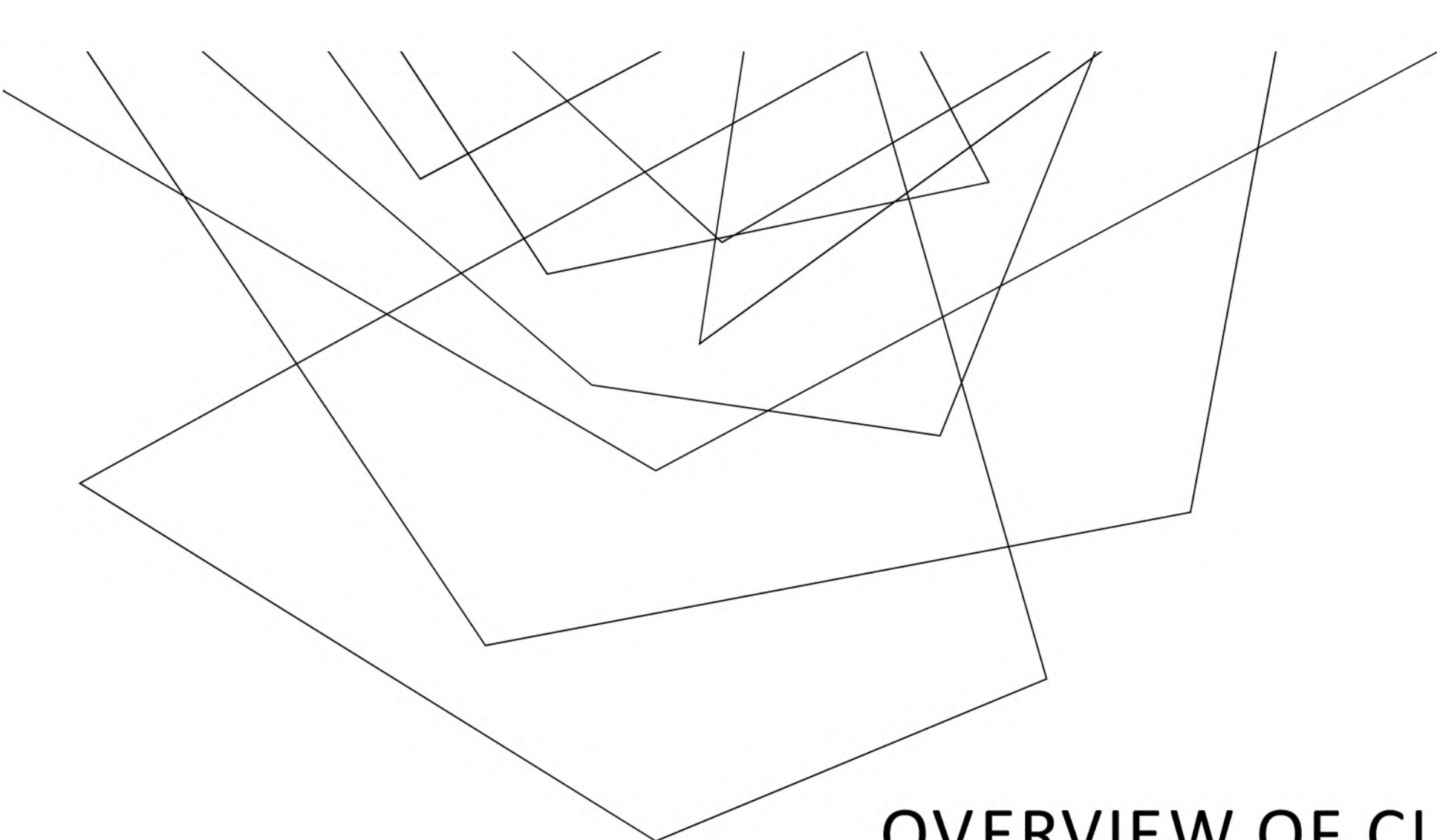
Budget 2021 provides \$1B in investments in the tourism sector:

- **Tourism Relief Fund**, \$500M/two years (RDAs), including a *National stream for associations*, \$15M (ISED);
- **Support for internationally renowned festivals**, \$200M (Canadian Heritage);
- **Community-oriented events**, \$200M (RDAs); and
- **Marketing**, \$100M (Destination Canada).

FURTHER TARGETED INVESTMENTS

On October 21, the Government announced two new programs to provide the sector with further support at least through spring 2022 (Department of Finance):

- The **Tourism and Hospitality Recovery Program**;
- The **Hardest-Hit Business Recovery Program**; and
- Extension of some existing programs, including the **Canada Recovery Hiring Program** and replacing the **Canada Recovery Benefit** with the **Canada Worker Lockdown Benefit**.

A series of thin, black, overlapping geometric lines forming various polygons and shapes, primarily located in the upper left and center of the slide.

OVERVIEW OF CURRENT ISED PORTFOLIO ACTIVITIES IN SUPPORT OF THE ECONOMY





THE ISED AND PORTFOLIO STORY

The Department has a long-standing history of supporting the Canadian economy through its evolving mandate and ongoing mission to meet the shifting needs of industry.

1892

- The **Department of Trade and Commerce** (1892) primarily focused on the creation and expansion of national and regional transportation systems, export of natural resources, and growing the processing capacity of the manufacturing sector. The Department's focus shifted to mobilizing Canada's industrial capacity for war in 1939.

1963

- The **Department of Industry** (1963) shifted the primary focus to industry and innovation. The Department's 10 sector-focused branches aimed to increase Canadian productivity and large-scale production. Regional economic development was also first recognized as a key component of industry policy in this era via the creation of the Area Development Agency.

1969

- The **Department of Industry, Trade and Commerce** (1969) brought together trade and industrial policy. The Department's primary focus was to promote the establishment and growth of the manufacturing, processing, and tourism industries, improve the productivity of Canadian industry, and foster the expansion of Canadian trade.

1982

- The **Department of Regional and Industrial Expansion** (1982) merged industry policy and regional economic development. Trade functions were removed and the Department's programming efforts focused on supporting large-scale industrial development.



THE ISED AND PORTFOLIO STORY

1987

- The **Department of Industry, Science and Technology Canada** (1987) was created in response to the growing prominence of science and technology as a key component of economic policy. Some shifts in the era included a more prominent role in encouraging technology transfer and basic and applied R&D, and ensuring the availability of a highly skilled labour force.

1993

- **Industry Canada** (1993), essentially a merger of four existing departments (Industry, Science and Technology Canada; Consumer and Corporate Affairs; Department of Communications; and Investment Canada), was established in response to the unfavourable economic and financial climate in the early to mid-1990s. The role of the Department shifted toward micro-economic policy, with a *raison d'être* to promote productivity and innovation and create the conditions for a more competitive business climate.

2015

- **Innovation, Science and Economic Development Canada** (2015) reinforced the centrality of innovation to industrial policy and economic development across all sectors and regions of the country. The ISED Portfolio has shifted toward being a more active and direct partner with businesses, innovators, entrepreneurs, the higher education sector, and civil society. This era has also coincided with a renewed emphasis on working collectively across departments and central agencies to generate whole-of-government solutions to growing the economy for all Canadians.



OVERVIEW OF CURRENT ISED AND PORTFOLIO ACTIVITIES

OVERVIEW OF MANDATE-LINKED ACTIVITIES

**Responding to the COVID-19
Pandemic**

**Supporting Canadian
Sectors**

**Helping Small Businesses
Adapt, Thrive, and Scale**

Regional Development



OVERVIEW OF MANDATE-LINKED ACTIVITIES





Responding to the COVID-19 Pandemic

The COVID-19 pandemic resulted in an unprecedented economic shock impacting all sectors of the Canadian and global economies, business operations and consumer preferences. ISED and the Portfolio have and continue to work to position Canada to thrive economically by supporting the unique needs of the sectors that make up our economy and by helping them adapt to the impacts of the pandemic.

As part of their contribution to the Government of Canada's response to the COVID-19 pandemic, ISED and the Portfolio built upon their long-standing partnerships with industry to mobilize forces to respond to the public health crisis.

Together with Canadian firms, a number of important elements in Canada's response to the COVID-19 pandemic were developed to mobilize industry response, support hard-hit businesses, build resilience, and support longer-term recovery.



Responding to the COVID-19 Pandemic

1. Supporting hard-hit Canadians and Canadian businesses:

- Building on emergency support programs to fill key gaps by supporting Canadian firms through funding and providing access to capital for firms in the hardest hit sectors (e.g., **Highly Affected Sectors Credit Availability Program** and **Business Development Bank of Canada**, the **Large Employer Emergency Financing Facility**).
- Providing additional support to hard hit sectors through the **Regional Relief and Recovery Fund***, the **Tourism Relief Fund**, the **Aerospace Regional Recovery Initiative**, and the **Canadian Seafood Stabilization Fund**, administered by the Regional Development Agencies, which are now led by separate Ministers.
- Providing \$741M in **temporary support to students, researchers, and trainees** in the academic research community to help preserve Canada's research base and its talent.
- **Launching** a new **Business Benefits Finder** and **ExploreIP**, both with new COVID-related categories, and working with firms to identify and use measures that respond to their needs.
- Helping rural Canadians adapt to working from home and improving access to high-speed Internet for Indigenous peoples and vulnerable Canadians (**Universal Broadband Fund**).



Responding to the COVID-19 Pandemic

2. Mobilizing industry response:

- Issuing the **Made-In-Canada Call to Action**: partnering with industry to secure domestic production of key personal protective equipment and medical supplies for front-line workers.
- Supporting digital responses to COVID-19 in tandem with industry through the **COVID Alert App Framework**; and sharing regular COVID-19 updates via the **Canada Business App**.

3. Building Canada's resilience and supporting longer-term recovery:

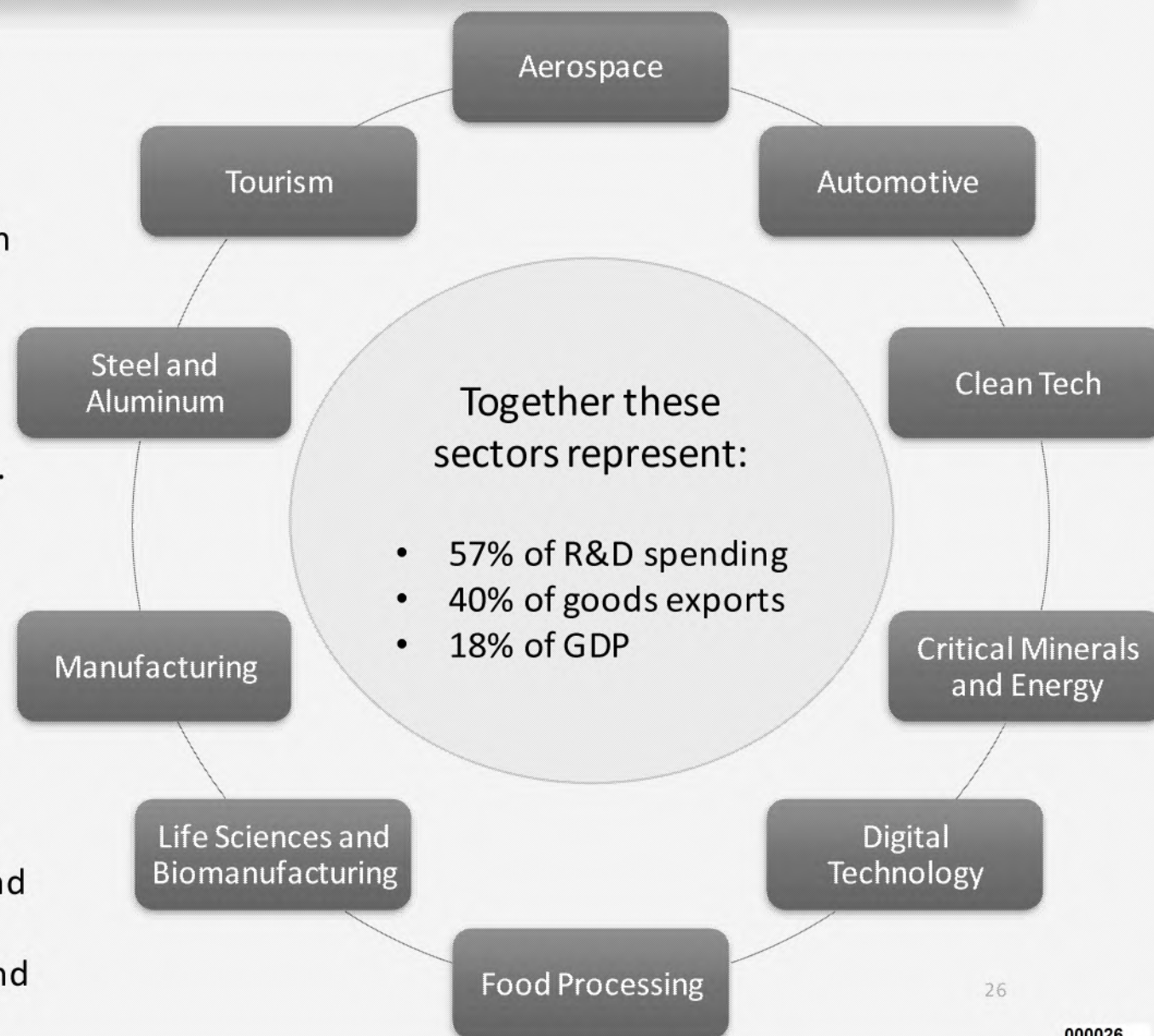
- Investing \$1.2B through the **Strategic Innovation Fund** to support over a dozen Canadian companies to develop vaccines, treatments, and facilities in Canada for the fight against COVID-19 and for pandemic preparedness.
- Working with partners and industry to develop the **Biomanufacturing and Life Sciences Strategy**; securing new funding for **life sciences research and biotechnology** and national strategies on **artificial intelligence, quantum and genomics**.
- Launching calls through **Innovative Solutions Canada** for prototypes and awarding \$35M to 55 innovations to develop solutions to combat COVID-19 and similar threats.
- Funding leading-edge innovations to keep Canadians safe and help the economy recover with more than 80 projects worth over \$220M through the **Innovation Superclusters Initiative**.



Supporting Canadian Sectors

KEY SECTORS WHERE ISED TAKES A LEAD ROLE

- **ISED** leads the Government's work with key industrial sectors to improve conditions for investment, enhance innovation performance, increase our share of global trade, and build a fair, efficient, and competitive marketplace.
- **ISED** brings together the expertise, programs, and services of the Government to meet priorities and support businesses in reaching their potential.
- **ISED** works directly with businesses to gain insights, respond to challenges, and develop solutions to drive economic growth by focusing on opportunities and building on Canada's strengths.





Supporting Canadian Sectors



PANDEMIC RESPONSE AND READINESS

Fostering recovery by strengthening and rebuilding biomanufacturing capabilities and supporting Made-in-Canada technologies, including personal protective equipment.



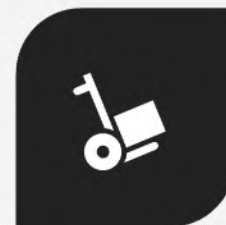
INNOVATION AND R&D

Supporting the Canadian economy through strategic actions and investments to build Canada's innovation advantage in growing technology and promote digital adoption across all industries.



SUSTAINABILITY AND EMISSIONS REDUCTION

Supporting the decarbonization of Canadian industries and the economy to accelerate the transition to sustainability and net-zero through expertise in clean technology capabilities and research to support new policies and programs enabling clean technologies.



SUPPLY CHAIN RESILIENCY AND TRADE

Supporting efforts to shape a more resilient and inclusive economy reinvesting in domestic manufacturing expertise and capacity, stabilizing global supply chains, and expanding trade relationships.



SKILLS AND TALENT

Delivering skills programming focused on driving innovation and helping ensure that Canada's workforce meets industry needs by inspiring youth toward future careers and supporting work-integrated learning and training in high-growth sectors.

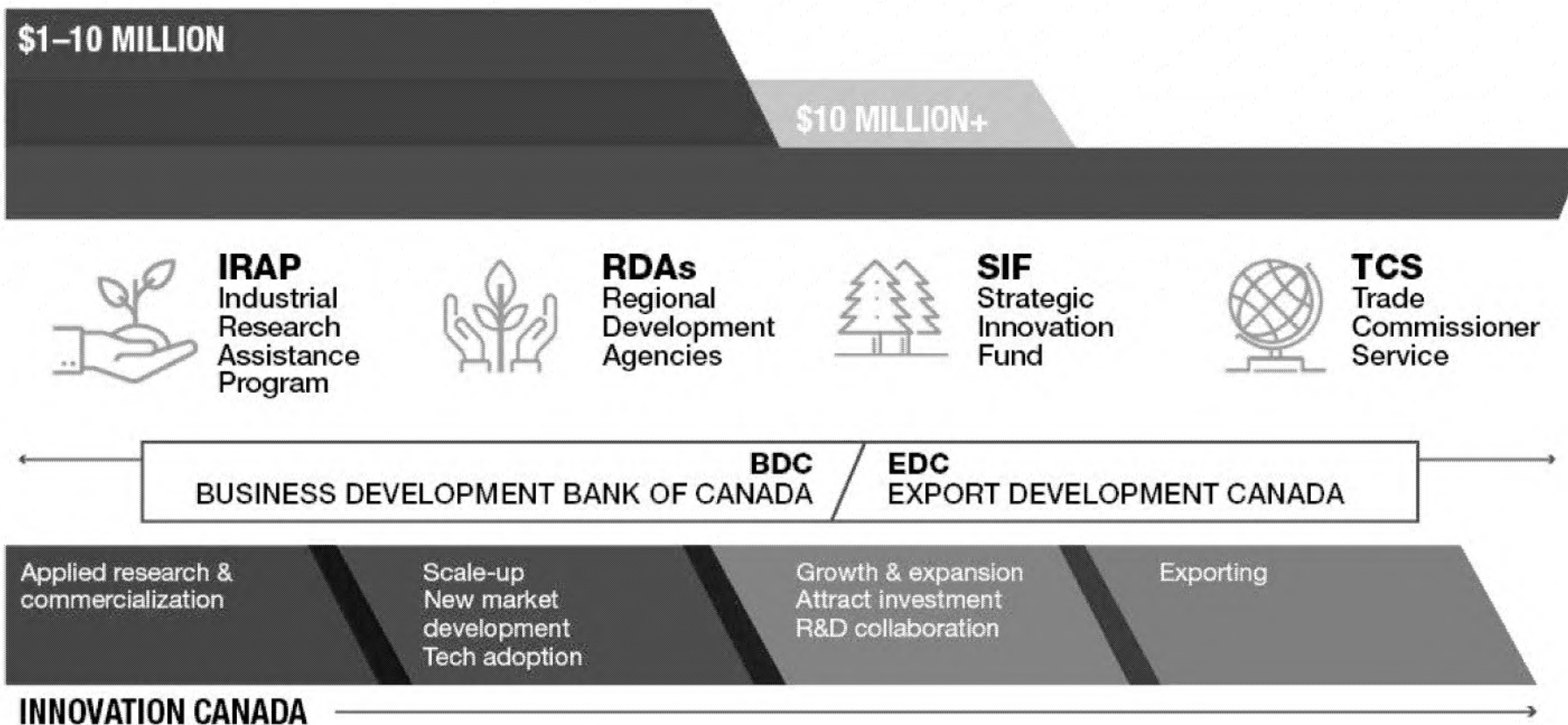


Supporting Canadian Sectors

PROGRAM SUPPORTS

ISED and the Portfolio's four flagship innovation support programs each target support at a different critical stage of firm growth:

FOUR FLAGSHIP PROGRAMS



Aligned access and
demand-driven

Single point
of access

Save firms time
and money

Developing
a pipeline

Scale-up



Supporting Canadian Sectors

PROGRAM DATA AND KEY FIGURES

NRC-IRAP

9,349 firms assisted

2,510 new projects funded

2,086 firms funded

892 youth jobs supported, with **90%**
youth employed/self-employed
post-internship

12,146 jobs supported

\$319.7M invested through grants and
contributions

Data as of 2020-21

Strategic Innovation Fund (SIF)

(Launched July 2017)

96 announced projects

\$4.8B in SIF contributions

\$51.8B in total investment leveraged

\$15.2B secured in R&D investment

22.5K commitments for co-op and
training opportunities

Data as of August 31, 2021

Regional Development Agencies (RDAs)*

7 RDAs working with **268** local
Community Futures Organizations

148,722 jobs and **24,872** businesses
and organizations supported or
preserved during the pandemic
through the Regional Relief and
Recovery Fund

\$730M+ for core grants and
contributions for 2021-22

\$2.2B in new, targeted support
through Budget 2021

Data as of August 2021

*Outside the ISED Portfolio and led by separate ministers



Supporting Canadian Sectors

PROGRAM SUPPORTS

ISED supports industry sectors by providing a one-stop shop for financing and expert advice and by driving new collaborations to help businesses innovate, create jobs, and grow Canada's economy.

- The **Strategic Innovation Fund** invests in innovative businesses and collaborative projects to support scale-up and research, develop and commercialize cutting-edge ideas, and collaborate in new ways (e.g. **Net-Zero Accelerator** to support clean technology development and adoption by Canadian businesses and ecosystems).
- The **Innovation Superclusters Initiative** brings together entrepreneurs, researchers, accelerators, small and medium-size enterprises, and global firms to consolidate Canada's technology strengths in areas of global advantage. The five superclusters are regionally anchored and have national reach (Digital Technology, Protein Industries, Advanced Manufacturing, Scale AI, and Ocean).
- **Innovative Solutions Canada** is helping Canadian innovators who want to start, grow, and get to market by funding R&D and testing prototypes in real-life settings.
- **Canada Digital Adoption Program's** Stream 2 will help SMEs with access to programs and services to digitize their businesses toward resilience and growth.
- The **Accelerated Growth Service**, **BizPaL**, and **Business Benefits Finder** aim to help Canadian businesses grow from start-up to scale-up to global brand.
- **ExploreIP**, **Canada's IP Marketplace**, and associated online tools help Canadian businesses access valuable publicly owned IP to licence, collaborate, and commercialize.



Supporting Canadian Sectors

PORTFOLIO PARTNERS

- ISED works with other departments on investment attraction to encourage foreign firms to invest in Canada to bring new jobs, adopt advanced technologies, and boost our economy. ISED is responsible for ensuring foreign investment benefits the Canadian economy through the administration of the *Investment Canada Act*.
- The **Portfolio** delivers a broad suite of industry-focused programs to support business needs—from helping businesses access skilled talent to grow and innovate, through building innovation ecosystems, to exporting and scaling up globally. For example:
 - The **National Research Council Canada** labs and the **Industrial Research Assistance Program** work directly with individual businesses across the country on their research and commercialization needs.
 - The **Canadian Space Agency** supports the growth of the space industry and encourages the transfer and commercialization of space technology throughout Canadian industry.
 - **Regional Development Agencies**, now formally outside the Portfolio and led by separate ministers, work to address key economic challenges by providing regionally tailored programs, services, knowledge, and expertise, including delivering direct project funding for local enterprises, regional ecosystems, and community economic development and diversification, and implementing national programs such as the Women Entrepreneurship Fund.
 - **Destination Canada** promotes Canada as a tourism destination by uniting tourism leaders and providing a platform for businesses to connect with global customers.



Helping Small Businesses Adapt, Thrive, and Scale

- Small businesses make up nearly 98% of businesses in Canada and are important to Canada's economy, employing 64% of workers. While Canada generally excels at creating new businesses, maximizing export potential and creating high-growth and large anchor firms remains a challenge.
- A current function of the Portfolio is **to support small businesses through access to financing**. This includes direct funding through grants and loans, as well as support in raising capital. Many of the Portfolio financing programs include **mentorship and capacity building**, offering knowledge sharing, resources, and expert advice direct to entrepreneurs and small-business owners.
- The Portfolio works to encourage **market diversification and global market access** by promoting key trade and investment agreements, advancing negotiations on new agreements, and helping entrepreneurs expand globally.
- The Portfolio also supports the small-business ecosystem more broadly through its role in **supporting effective regulation and access to talent pipelines**, and through **direct business-facing services**, such as the **Canada Business App**, to help small businesses better access government services and programs.



Helping Small Businesses Adapt, Thrive, and Scale

- Existing programs support a wide range of entrepreneurs (**Women Entrepreneurship Strategy, Black Entrepreneurship Program, Futurpreneur**, and the **Small Business and Entrepreneurship Development Program**) to start a business, and small and medium-sized enterprises to grow in Canada and globally.
- The **Canada Digital Adoption Program's Stream 1** is intended to help SMEs take advantage of e-commerce opportunities, while **Stream 2** helps businesses with the development and implementation of digital adoption strategies.
- The **Canada Small Business Financing Program** enhances access to capital by working with Canadian financial institutions to risk share small business loans.
- ISED further complements these SME supports through its business innovation programming:
 - The **Strategic Innovation Fund** supports innovation networks that facilitate collaborative innovation projects, often involving smaller companies.
 - 47% of **Supercluster** project partners are SMEs, linking innovative SMEs with larger firms and research institutes to leverage the industry network.
 - **Innovative Solutions Canada** leverages procurement to enable the Government to act as a first customer and support innovative Canadian SMEs.
 - The Innovation Advisors within the **Accelerated Growth Service** help high-growth SMEs find government support—from financing to technical advice to foreign market expertise.



Helping Small Businesses Adapt, Thrive, and Scale

PORTFOLIO PARTNERS

- **The Business Development Bank of Canada** provides financing, advisory services, and capital investments for SMEs, intended to supplement or complete services available from commercial financial institutions.
- The **Business Development Bank of Canada** also delivers programs on behalf of government, such as the **Venture Capital Catalyst Initiative**, which leverages private sector funds to increase the availability of funding targeting high-potential start-ups, and supports the **Canada Digital Adoption Program** by providing 0% interest loans to finance the implementation of business' technology adoption plans.
- **The National Research Council Canada** delivers the **Industrial Research Assistance Program**, which provides technical advice to over 8,000 SMEs and funding to over 3,500 SMEs each year.
- **Regional Development Agencies**, now formally outside the Portfolio and led by separate ministers, address key economic challenges by providing regionally tailored programs, services, knowledge, and expertise, including delivering direct project funding for SMEs, regional ecosystems, community economic development and diversification, marketing and destination development in support of tourism, and by implementing national programs such as the **Regional Relief and Recovery Fund**, which provides assistance to businesses and communities that require additional support to cope with and recover from the pandemic.



Regional Development

The ISED Portfolio engages regionally via two principal avenues:

1. ISED's five Regional Offices, reporting through the Strategy and Innovation Policy Sector—Pacific, Prairie and Northern, Ontario, Quebec, Atlantic:

- Gather and report regional intelligence, provide support to ministerial and VIP outreach, and support implementation of certain key departmental files; and
- Play a key role in enhancing the Department's understanding of the economic benefits and potential of Canada's economy with knowledge of local issues and networks with stakeholders.

2. Federal, Provincial and Territorial (FPT) Table for Innovation and Economic Development:

- Supports FPT ministers and deputy ministers in sustaining and enhancing collaboration on innovation and economic development;
- Was created in 2016 and is currently co-chaired by ISED and the Government of Ontario; and
- Includes an assistant deputy minister-level FPT table, which began meeting regularly to advance deputy ministers' priorities following the outbreak of the pandemic.



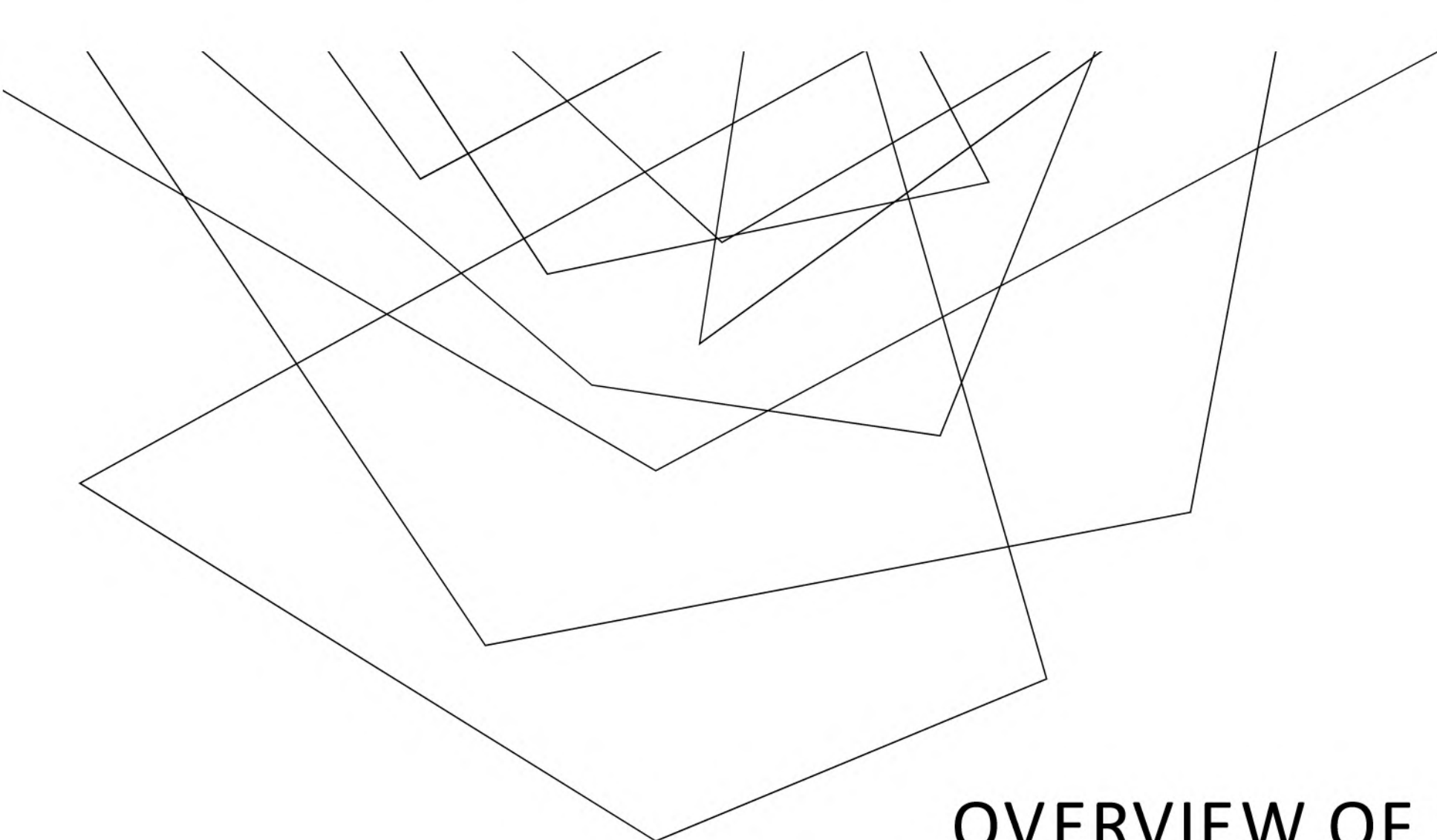
Regional Development

With respect to tourism, ISED also engages regionally through the **Canadian Council of Tourism Ministers**:

- Forum for FPT ministers and deputy ministers to collaborate to grow the tourism sector and create opportunities for community economic growth;
- Currently co-chaired by the federal Minister of Tourism and the Minister of Tourism of Quebec, supported by a deputy minister table.

Additionally, outside the ISED portfolio is a network of **seven Regional Development Agencies**, now under separate ministers—CanNor, PacifiCan, PrairiesCan, FedNor, FedDev Ontario, CED, ACOA:

- Consists of federal organizations responsible for fostering long-term economic growth in the regions they serve, each led by a regionally based president;
- Provides a key federal presence in the regions via long-standing relationships with local stakeholders and businesses, allowing them to provide “on-the-ground” knowledge and expertise for the federal government; and
- Delivers direct project funding for SMEs, regional ecosystems, and community economic development and diversification projects, including key COVID supports and economic recovery initiatives (e.g. Regional Relief and Recovery Fund, Tourism Relief Fund) and national initiatives (e.g. Women Entrepreneurship Fund).

A series of thin, black, overlapping geometric lines and polygons that create a complex, abstract pattern in the upper left and center of the slide.

OVERVIEW OF ISED





DEPARTMENTAL DIVISIONS

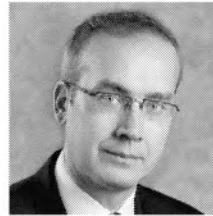
The units within the Department that help carry out the activities of ISED are:

- Industry Sector
- Strategy and Innovation Policy Sector
- Innovation Canada
- Science and Research Sector
- Small Business and Marketplace Services
- Spectrum and Telecommunications Sector
- Digital Transformation Service Sector
- Corporate Management Sector
- Strategic Communications and Marketing Sector
- Canadian Intellectual Property Office
- Competition Bureau
- Audit and Evaluation Branch
- Legal Services

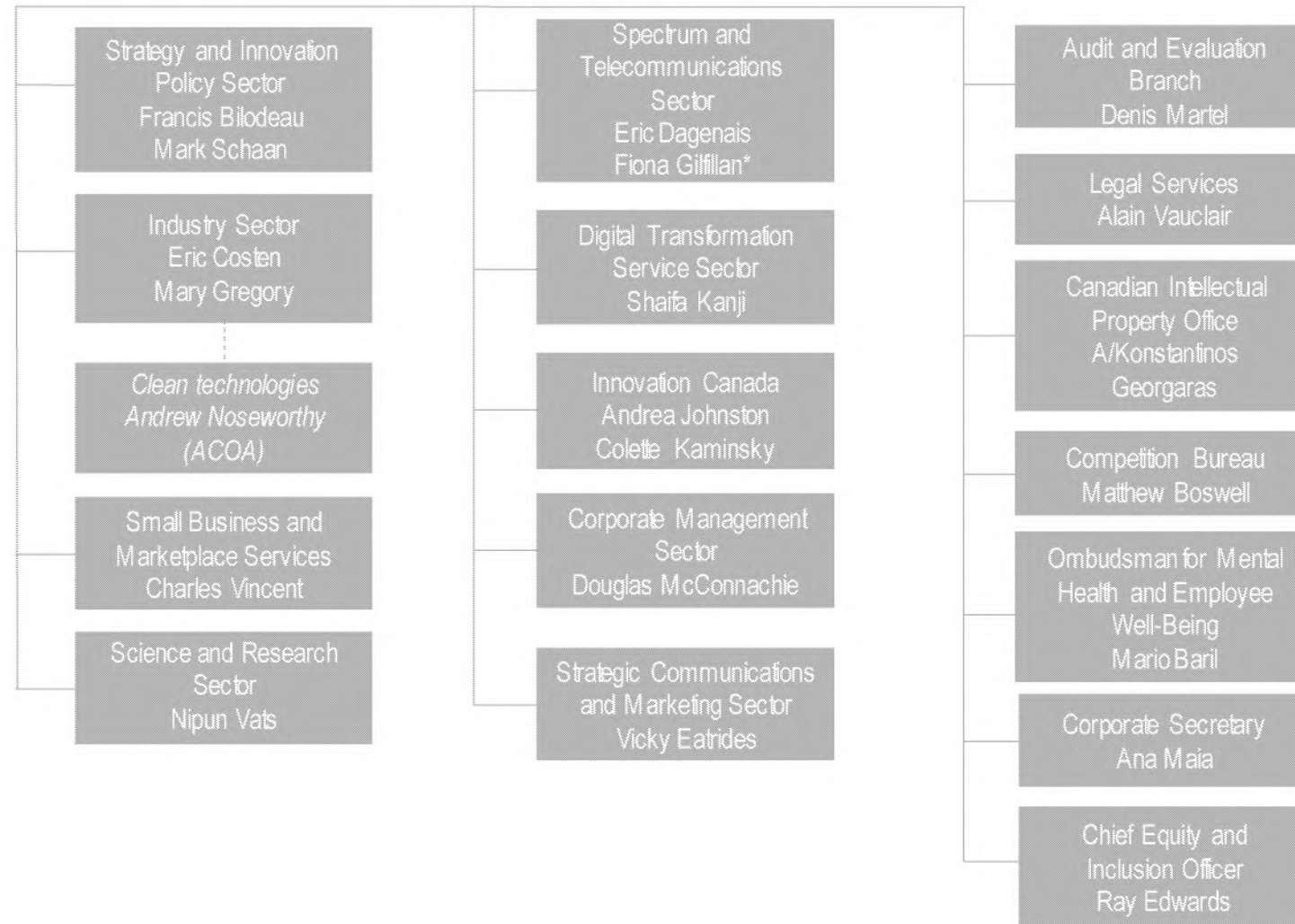


DEPARTMENTAL DIVISIONS CHART

**Deputy
Minister**
**Simon
Kennedy**



**Associate
Deputy
Minister**
**Paul
Thompson**



The whole of ISED is here to support your mandate. In particular, the Industry Sector is a key area supporting your agenda.



INDUSTRY SECTOR (IS)

Mandate

IS is the centre for the provision of advice on the Government's industrial policy, based on economic and technological expertise and industry outreach. In this capacity, the sector is responsible for the following industries: automotive, manufacturing, digital technologies, biomanufacturing, life sciences, tourism, clean technologies, aerospace, space, marine, and defence. The sector also supports the Government's delivery of industry-focused programs, and supports the advancement of a skills agenda aligned with industry needs. IS undertakes investment attraction work in collaboration with other departments and the Invest in Canada Hub, including the Government's industry promotion efforts. The sector is also responsible for the administration of the Investment Canada Act and the management of the Industrial and Technological Benefits Policy.



INDUSTRY SECTOR (IS)



Eric Costen
Senior Assistant
Deputy Minister

Eric Costen

Eric Costen has been working in the Department since February 2021. Previously, he was the Associate Assistant Deputy Minister of Health Canada's Controlled Substances and Cannabis Branch where he was responsible for the Government's national drug policy, programs, and regulations, including the opioid overdose crisis response strategy and the design and implementation of *The Cannabis Act*. Prior to this, he held a range of executive positions throughout the Department.



Mary Gregory
Associate Assistant
Deputy Minister

Mary Gregory

Mary Gregory has been working in the Department since March 2012. Prior to this position, she held various senior leadership roles in the organization, including Director General of the Aerospace, Defence and Marine Branch and Executive Director of the Industrial and Regional Benefits Directorate. Before joining ISED, Mary held executive positions with the Treasury Board of Canada Secretariat and Health Canada.



INDUSTRY SECTOR (IS)



Andrew Noseworthy
Assistant Deputy Minister

Andrew Noseworthy

Andrew Noseworthy has been working in the Department since March 2016. Over the past five years, he has overseen policy and operational activities related to clean technology in Canada, including the Clean Growth Hub, and served as co-secretary to one of the Economic Strategy Tables. Prior to joining the public service in 2003, he had an 18-year career with the Government of Newfoundland and Labrador, where he held a number of senior appointments.



STRATEGY AND INNOVATION POLICY SECTOR (SIPS)

Mandate

SIPS plays a key role in implementing the Government's microeconomic policy agenda and in supporting departmental alignment. It develops and supports the Department's horizontal policy and strategy by ensuring robust marketplace frameworks and by deepening international and regional relations and promoting trade. It also coordinates for the federal budget and is responsible for telecommunications and digital policy. Also within SIPS are the regional offices, which gather intelligence in the regions and act as the Portfolio's public face with regional stakeholders.



STRATEGY AND INNOVATION POLICY SECTOR (SIPS)



Francis Bilodeau
Senior Assistant
Deputy Minister

Francis Bilodeau

Francis Bilodeau has served as Senior Assistant Deputy Minister of SIPS since May 2020. Prior to joining ISED, Francis held several senior positions in the Government of Canada, including serving as the Government of Canada's Acting Chief Information Officer of Canada and in assistant deputy minister positions at the Treasury Board of Canada Secretariat and the Privy Council Office. Francis has also previously held various federal government executive positions. Francis holds a degree in mechanical engineering as well as a master's degree in business administration.



Mark Schaan
Associate Assistant
Deputy Minister

Mark Schaan

Mark Schaan has served as Associate Assistant Deputy Minister of SIPS since January 2020. Prior to becoming an Assistant Deputy Minister, Mark was the Director General, Marketplace Framework Policy Branch, at ISED. In this role, Mark advised on the policy, legislative, and stakeholder issues relating to privacy and data protection, patents, trademarks, copyright, competitions, and insolvency. Mark's public service career has included roles across the policy spectrum, as well as leading on revitalizing the public service through innovative recruitment models. Mark holds a degree in political science, a master's degree in comparative social policy, and a doctorate in social policy.



INNOVATION CANADA SECTOR (ICS)

Mandate

ICS is a sector formed in 2017 that serves as a collaborative platform to make it easier and faster for Canada's innovators and entrepreneurs to find and access government programs and services. Through ICS, ISED supports various industry sectors across the Canadian economy by providing funding and expert advice, and driving new collaborations. As part of this role, ICS's flagship programs and services are designed to help businesses innovate, create jobs, and grow Canada's economy. These include: the Innovation Superclusters Initiative; the Strategic Innovation Fund; Innovative Solutions Canada; the Canada Digital Adoption Program; ExploreIP (Canada's intellectual property marketplace); BizPal; Business Benefits Finder; and the Accelerated Growth Service.



INNOVATION CANADA SECTOR (ICS)



Andrea Johnston
Assistant Deputy Minister

Andrea Johnston

Andrea Johnston was appointed Assistant Deputy Minister of ICS in July 2018. She first joined the Department in May 2017 as the Director General of the Economic Strategy Tables and Skills Branch. Prior to joining the Department, Andrea had an extensive career at Agriculture and Agri-Food Canada.



Colette Kaminsky
Associate Assistant
Deputy Minister

Colette Kaminsky

Colette Kaminsky was appointed Associate Assistant Deputy Minister of ICS in 2021. She first joined the Department in September 2017 as the first Director General of the Strategic Innovation Fund. Prior to joining the Department, Colette held several leadership roles at Agriculture and Agri-Food Canada, Finance, and the Privy Council Office.



SCIENCE AND RESEARCH SECTOR (SRS)

Mandate

SRS leads the development and implementation of the Government of Canada's science and technology policy agenda to optimize federal investments in science and research, foster an innovative economy, and improve the wealth and well-being of Canadians. The sector provides advice on external research, relationships with post-secondary institutions, granting agency policy, programs, and operations; and also advises on and manages contribution agreements with a variety of external organizations. The sector also provides advice on a range of science policy issues, including the broader intramural science enterprise and international science co-operation, and leads the development of strategies to enhance the translation of Canada's research leadership in key disruptive technology areas into commercial and societal benefits for the country (e.g. quantum, AI, genomics).



Nipun Vats
Assistant Deputy Minister

Nipun Vats

Before his role in SRS, Nipun Vats held a variety of positions within the federal government, including in the Priorities and Planning Secretariat of the Privy Council Office, and in the policy and administration of the major transfer payment programs to the provinces and territories at the Department of Finance. He has also served as Secretary to a National Advisory Panel on Energy Science and Technology. Nipun also served as the lead federal official in the successful negotiation of the Canadian Free Trade Agreement.



SMALL BUSINESS AND MARKETPLACE SERVICES (SBMS)

Mandate

SBMS is responsible for small business and entrepreneurship policy and programs. It undertakes financing and venture capital policy development and coordination, oversight of the Business Development Bank of Canada, and delivery of the Canada Small Business Financing Program. The sector is active on consumer policy coordination, protecting and promoting the interests of consumers. Measurement Canada, Corporations Canada, and the Office of the Superintendent of Bankruptcy Canada are all part of SBMS. These organizations play strong regulatory management roles in the areas of trade measurement, insolvency, and federal incorporation, supporting the integrity of the marketplace and providing a competitive environment that contributes to Canada's innovation performance.



Charles Vincent
Assistant Deputy Minister

Charles Vincent

Charles Vincent has been working in the Department since February 2012 and served previously as Assistant Deputy Minister within Industry Sector from October 2020 to October 2021. Prior to that role, he held other executive positions in the Department, including being responsible for the Made-in-Canada industry mobilization initiative during the COVID-19 pandemic, and being the Director General of the Automotive, Transportation and Digital Technologies Branch. Before joining ISED, Charles served as an executive at the Treasury Board of Canada Secretariat.



SPECTRUM AND TELECOMMUNICATIONS SECTOR (STS)

Mandate

STS is responsible for regulating telecommunications equipment, extending and enhancing broadband service in rural and remote regions of Canada, and working with other organizations on the safety and security of existing and future telecommunications infrastructure. The sector's objective is to maximize the economic and social benefits that Canadians derive from the use of the radio frequency spectrum. The sector works across the Department, with other federal government departments, at the international level and with our stakeholders to support a competitive wireless industry, strong investment, cyber-resilience, and economic growth.



SPECTRUM AND TELECOMMUNICATIONS SECTOR (STS)

Eric Dagenais



Eric Dagenais
Senior Assistant
Deputy Minister

Eric Dagenais has served as Senior Assistant Deputy Minister, STS, since June 2019. He has held the post of Assistant Deputy Minister in the Department since 2015 within various other sectors. Prior to this, Eric was the Director General of the Small Business Branch; Director General, MacKenzie Gas Project Office at Environment Canada; and Director General, Investment Review of ISED.

Fiona Gilfillan*



Fiona Gilfillan
Assistant Deputy Minister

Fiona Gilfillan has worked in the telecommunications industry for over 25 years. She has been Assistant Deputy Minister in STS for over 4 years and has spent over 10 years in the sector, leading major auctions and files. Before joining ISED, Fiona worked at the Canadian Radio-television and Telecommunications Commission, where she led the Telecom Branch and was responsible for major telecommunications proceedings. She also has significant experience working for telecommunications companies, where she held senior executive positions.

*Assistant Deputy Minister Fiona Gilfillan will depart ISED, effective November 15, 2021, to take on a new role with the CRTC.



DIGITAL TRANSFORMATION SERVICE SECTOR (DTSS)

Mandate

DTSS leads the Department's digital service channels, in close collaboration with different areas of the Department, to accelerate digital services for businesses and innovators. DTSS is building new capabilities in digital transformation supported by a backbone of a modern information technology and information management infrastructure and is placing special emphasis on the power of disruptive technologies that can reduce the administrative burden for Canadians and public servants as we deliver digital services and programs.



Shaifa Kanji
Assistant Deputy Minister
and Chief Digital Officer

Shaifa Kanji

Shaifa Kanji assumed her role as Assistant Deputy Minister and Chief Digital Officer in August 2021. She began her career in the public service in 2011 and has led digital transformations in municipal government (Region of Peel) and not-for-profit (Toronto and Region Conservation Authority) organizations. Prior to joining the public sector, Shaifa worked in multiple sectors, such as telecommunications, finance, and consulting. Shaifa holds an Executive MBA from the Ivey Business School and a computer science degree from York University.



CORPORATE MANAGEMENT SECTOR (CMS)

Mandate

CMS is responsible for the comptrollership of the Department's finances, the management of human resources, the stewardship of facilities and assets, and the provision of physical and personnel security services. CMS also oversees the Department's corporate planning and accountability reporting regimes and provides strategic advice on performance measurement, risk management, the affordability of program proposals, and the integrity of grants and contributions. In addition, CMS leads the Department's efforts on the Return to the Workplace and the Future of Work.



Douglas McConnellie
Assistant Deputy Minister
and Chief Financial Officer

Douglas (Doug) McConnellie

Doug McConnellie joined ISED in October 2019 as Assistant Deputy Minister and Chief Financial Officer, Corporate Management. He has 25 years of experience in public sector management and corporate finance and has served in senior management roles at Environment and Climate Change Canada, Public Safety Canada, and Public Services and Procurement Canada.



STRATEGIC COMMUNICATIONS AND MARKETING SECTOR (SCMS)

Mandate

SCMS connects the Department and its Ministers with the Canadian public and helps support communications for the Portfolio. SCMS reaches national-, regional-, local-, and commercial-specific audiences through our digital channels, including web and social media, television, radio, and print. The sector actively seeks to break through a competitive environment with proactive, targeted media, marketing, and online strategies. The team of about 175 professionals is responsible for media relations, ministerial communications and events, marketing and advertising, social media, consultations, issues management, and employee communications.



Vicky Eatrides
Assistant Deputy Minister

Vicky Eatrides

Vicky Eatrides was named Assistant Deputy Minister of SCMS in October 2019. Since joining the public service in 2005, she has held a variety of increasingly senior executive positions. At the Competition Bureau, Vicky served as the Senior Deputy Commissioner for Cartels and Deceptive Marketing Practices, Deputy Commissioner of Competition Promotion, Assistant Deputy Commissioner of Mergers, and Chief of Staff to the Commissioner of Competition. From 2013 to 2015, she was the Director General of Strategic Policy and Planning for the Major Projects Management Office at Natural Resources Canada. Prior to joining the public service, Vicky practised federal regulatory law at Stikeman Elliott LLP.



CANADIAN INTELLECTUAL PROPERTY OFFICE (CIPO)

Mandate

CIPO, a special operating agency of the Department, is responsible for administering Canada's system of intellectual property (IP) rights: patents, trademarks, copyrights, industrial designs, and geographical indications. CIPO is also an international searching authority and international preliminary examining authority under the Patent Cooperation Treaty administered by the World Intellectual Property Organization. CIPO's mandate is to deliver high quality and timely IP products and services to clients, and to increase awareness, knowledge, and effective use of IP by Canadians. This mandate, along with the directions outlined in CIPO's business strategy, contributes to the strategic outcomes of the organization.



Konstantinos Georgaras
Chief Executive Officer
(Interim)

Konstantinos Georgaras

Konstantinos Georgaras joined CIPO in 2010 and was appointed as Chief Executive Officer (interim) in fall 2020. He also represents Canada at the World Intellectual Property Organization, one of the specialized agencies of the United Nations. He began his career in the public service in 1984 and has held strategic and executive positions within the departments of Innovation, Science and Economic Development Canada and Human Resources and Skills Development Canada, and within the Science, Technology and Innovation Council. He has extensive experience spanning strategic, economic, and legislative policy, with direct responsibilities for IP, innovation, insolvency, and industrial and labour market policies.

Konstantinos holds a Master of Arts in Public Administration from Carleton University and an Executive Certificate in Public Leadership from the John F. Kennedy School of Government at Harvard University.



COMPETITION BUREAU (CB)

Mandate

- CB, as an independent law enforcement agency, ensures that Canadian businesses and consumers prosper in a competitive and innovative marketplace. The Bureau is responsible for:
 - administering and enforcing the *Competition Act*, the *Consumer Packaging and Labelling Act*, the *Textile Labelling Act*, and the *Precious Metals Marking Act*;
 - advocating for competition at all levels of government; and
 - promoting corporate compliance and consumer awareness through outreach.
- Competition leads to lower prices, higher quality goods and services, and higher levels of innovation and business efficiency, and is thus a key driver of broad-based economic growth. The Bureau protects and promotes competition in the marketplace, saving Canadians an estimated \$2.8B per year through actions that stop anti-competitive conduct and deceptive marketing. The Bureau continues to set a course to tackle the emerging challenges of the digital economy, and ensure that competition can underpin a strong post-pandemic recovery.



Matthew Boswell
Commissioner of
Competition

Matthew Boswell

Matthew Boswell was appointed Commissioner of Competition on March 5, 2019, for a five-year term. Prior to his appointment, he served as a Senior Deputy Commissioner. Before joining CB, he was Senior Litigation Counsel in the Enforcement Branch at the Ontario Securities Commission (OSC), where he prosecuted securities fraud and other white-collar crimes. Prior to his work at the OSC, Matthew was an Assistant Crown Attorney in Toronto with the Ministry of the Attorney General of Ontario.



AUDIT AND EVALUATION BRANCH (AEB)

Mandate

AEB provides independent, professional, and quality audit, evaluation, and practice management services founded on sound values and ethics to support informed decision-making and enhanced performance and accountability. It also fulfills the Department's obligations under the Treasury Board of Canada Secretariat's policies, directives, and standards on internal audit and evaluations, as well as conformance with the Institute of Internal Auditors international standards.



Denis Martel
Chief Audit Executive
and Director General

Denis Martel

Denis Martel was appointed Chief Audit Executive and Director General, Audit and Evaluation, in January 2021. He has been with the Department since 2007 where he has worked as an executive in different functional areas: in program delivery (Strategic Innovation Fund), legislative and regulatory development (Patent Policy), as well as on economic research on small business and entrepreneurship. Prior to that, he held positions at the Privy Council Office and Finance Canada.



LEGAL SERVICES (LS)

Mandate

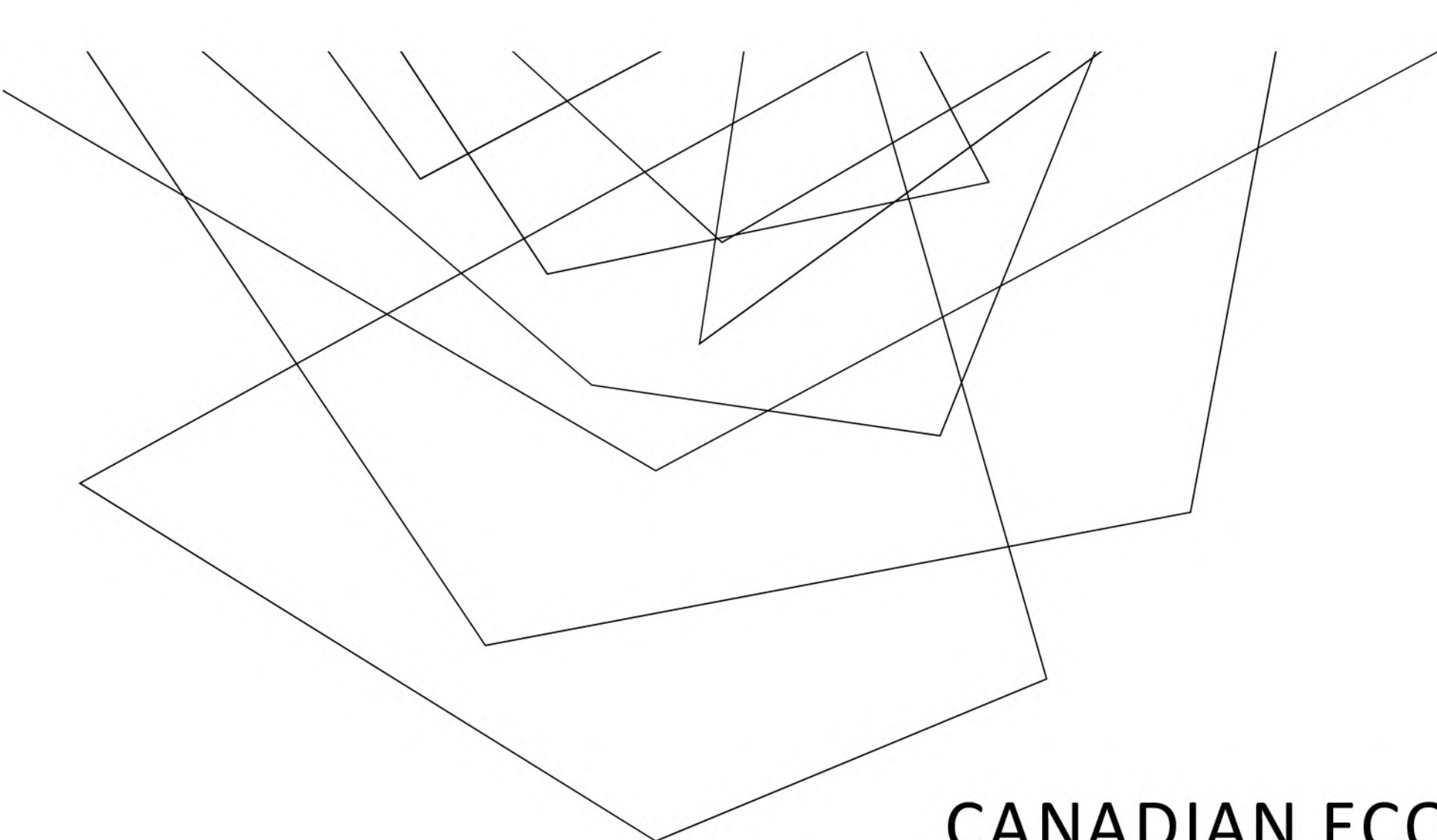
ISED's LS is a departmental legal services unit that is a part of the Business and Regulatory Law Portfolio of the Department of Justice. LS strives to deliver timely and effective professional legal services to all sectors of ISED, as well as to other government departments and agencies of the ISED Portfolio, according to the service agreements and standards set by the Department of Justice.



Alain Vaclair
Senior General Counsel
and Executive Director

Alain Vaclair

Alain Vaclair has been Senior General Counsel and Executive Director for the Portfolio's Legal Services (Department of Justice) since September 2018. From 2013 to 2018, he was the Senior General Counsel and Executive Director for the Public Services and Procurement Canada and Shared Services Canada LS. He was also responsible for the creation and launch of Department of Justice's Centre of Expertise in Procurement Law in 2017.

A series of thin, black, overlapping geometric lines and polygons that create a complex, abstract pattern in the upper left and center of the page.

CANADIAN ECONOMIC SNAPSHOT





THE CANADIAN ECONOMY IN A SNAPSHOT

Note: Data compiled based on published sources as of October 22nd 2021.

This section presents a snapshot of the current state of the Canadian economy. It covers the following topics:

The structure of the economy and trends

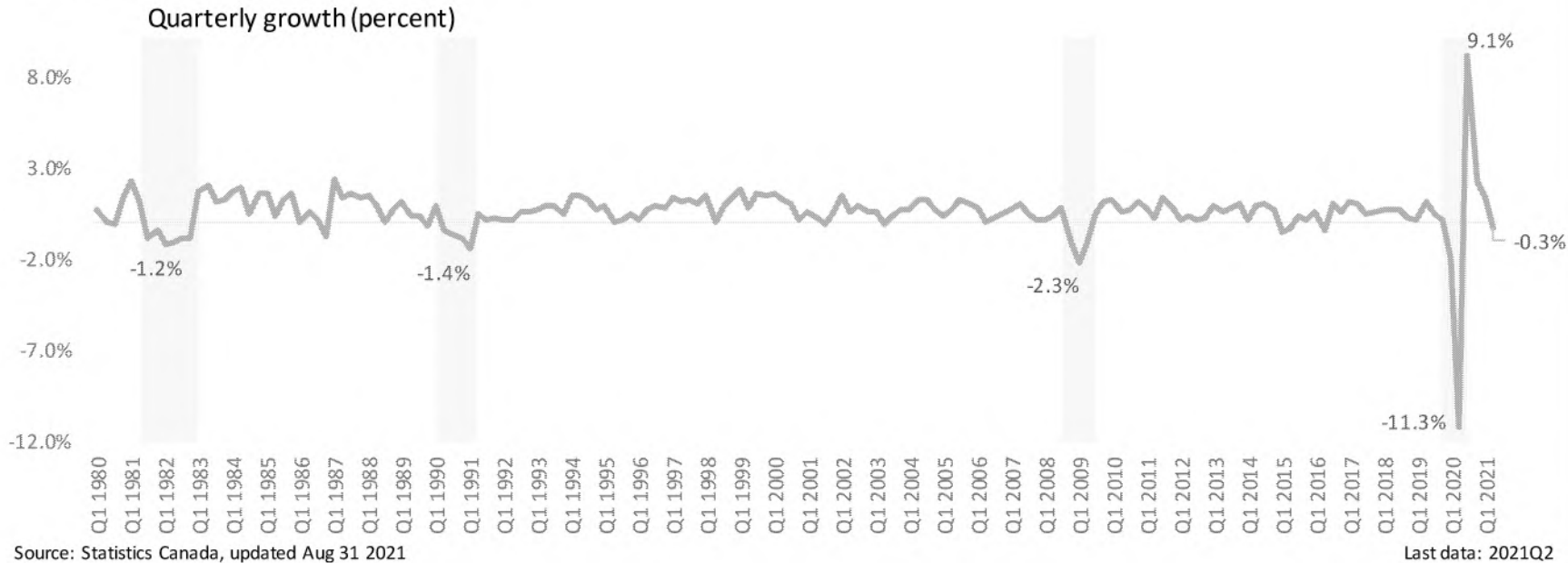
The pandemic and the economic recovery

An economic snapshot by region



Major economic indicators in Canada are slowly returning to pre-pandemic levels

Real GDP growth



Q2 2021

GDP
\$2,463B

GDP/capita
\$64,567

Exports
\$727B

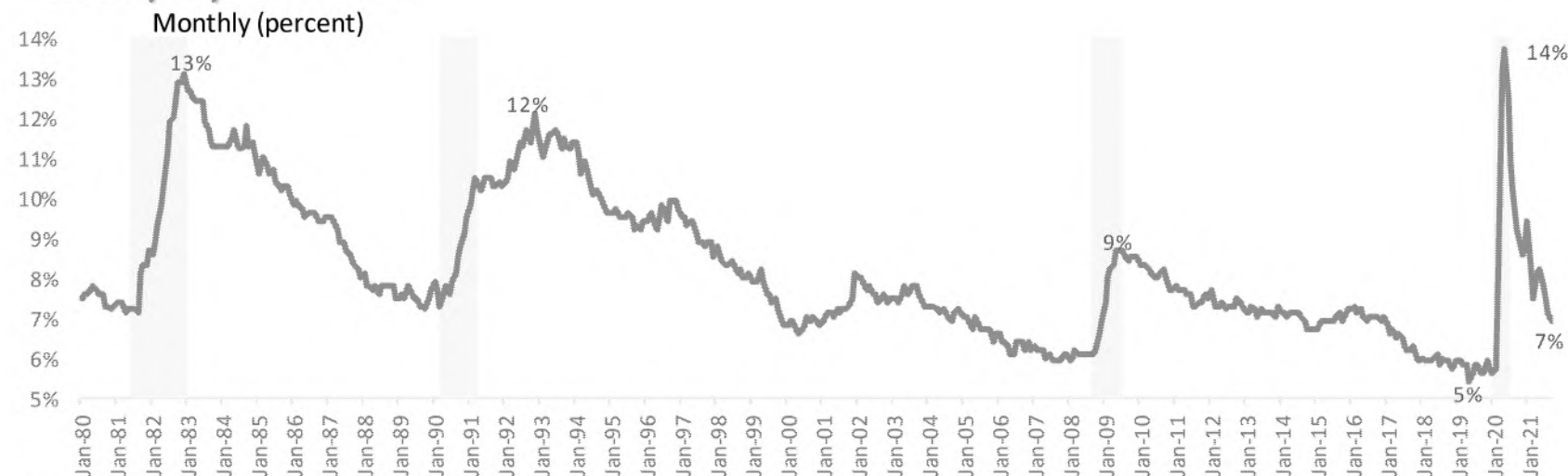
Business
investment
\$482B

Canada has the 9th largest economy in the world

Open economy with exports at more than a quarter of GDP

Top export markets include US, China, and the UK.

Unemployment rate



Sept 2021

Employment
19.1M

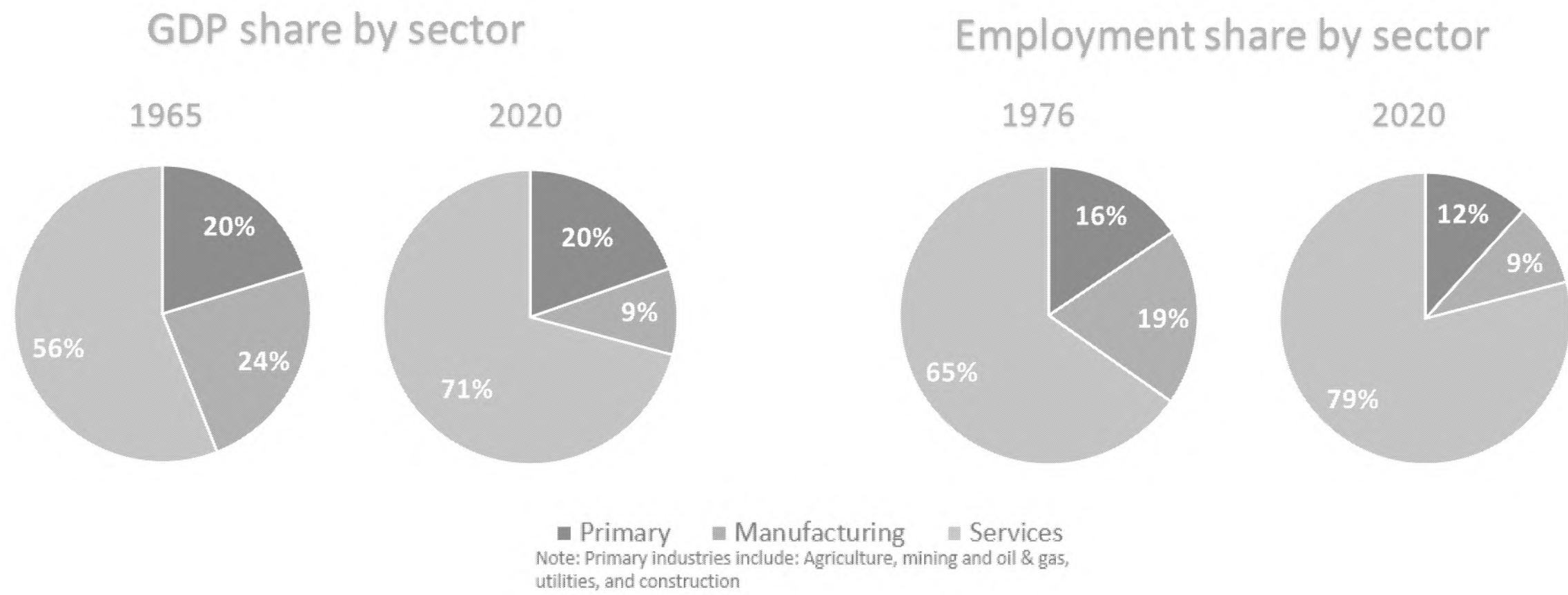
Participation rate
65.5%

Working-age
population
31.4M

Before the pandemic, unemployment reached lowest rate in more than 40 years

The economy reached pre-pandemic employment levels in September

Manufacturing's share of employment and GDP has been on the decline since the 1970s, while services have steadily increased.

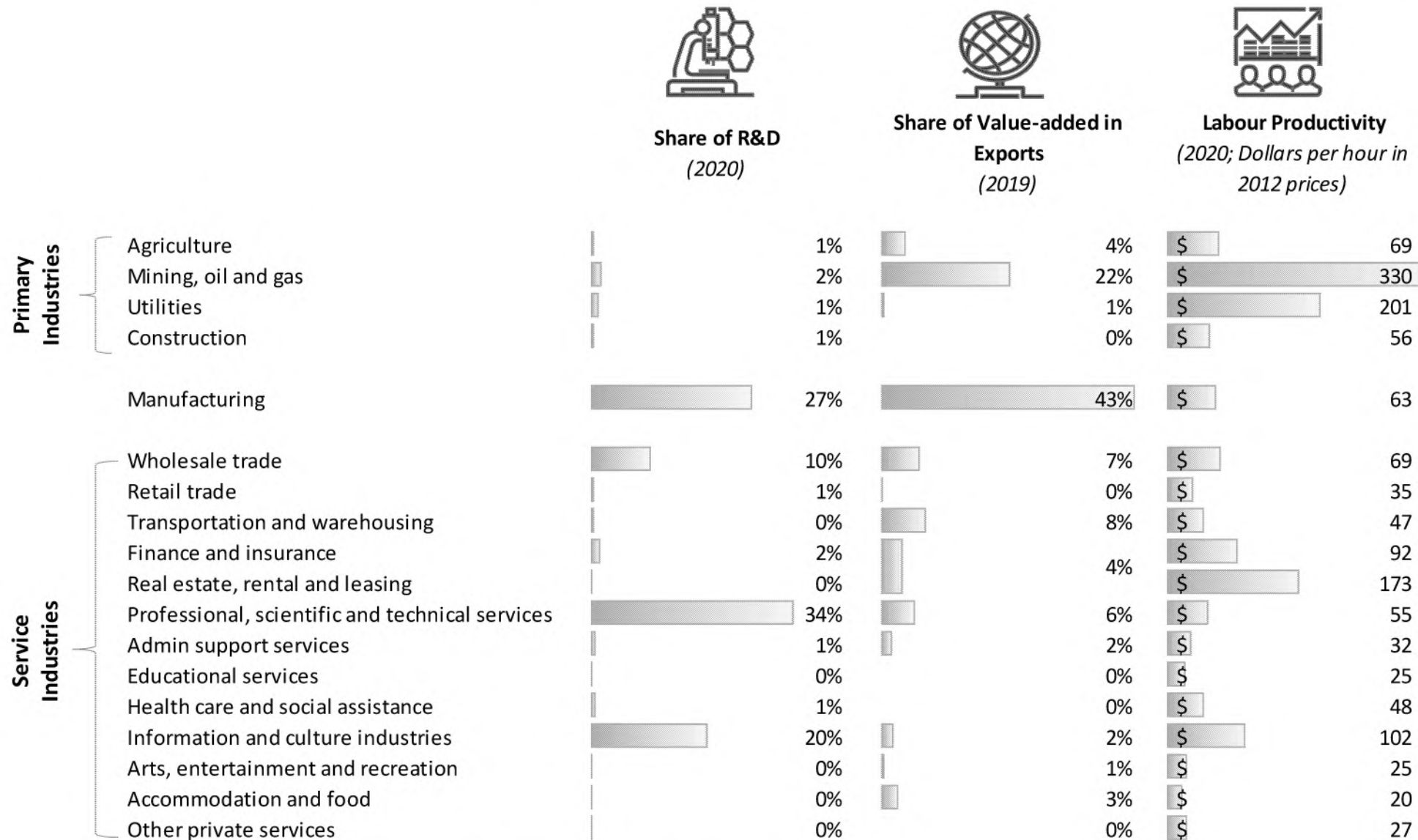


Canada is relatively more reliant on resources compared to many other developed nations.

Source: Statistics Canada; GDP data updated Oct 1 2021; Emp data updated Oct 8 2021



Research and development (R&D) spending and exports are concentrated in a few sectors, with manufacturing remaining a major player despite its decline

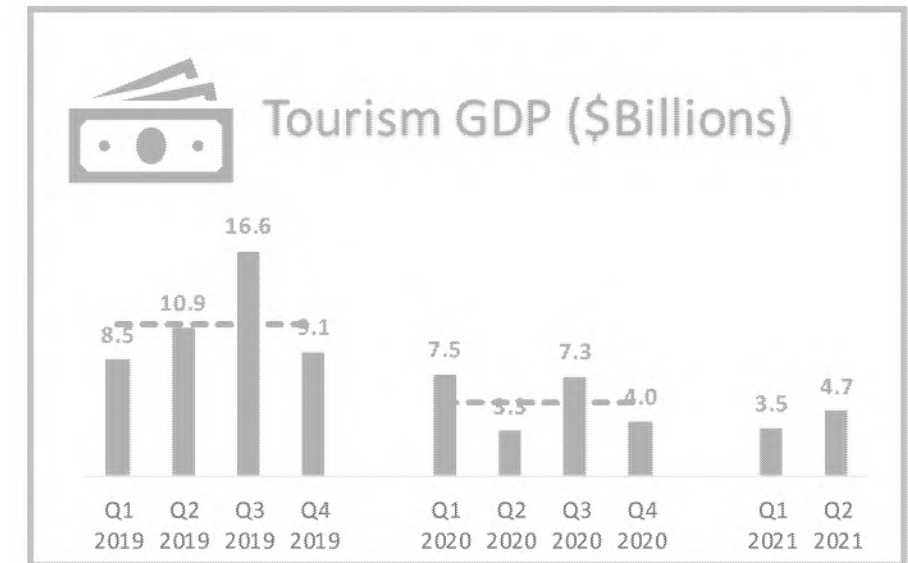
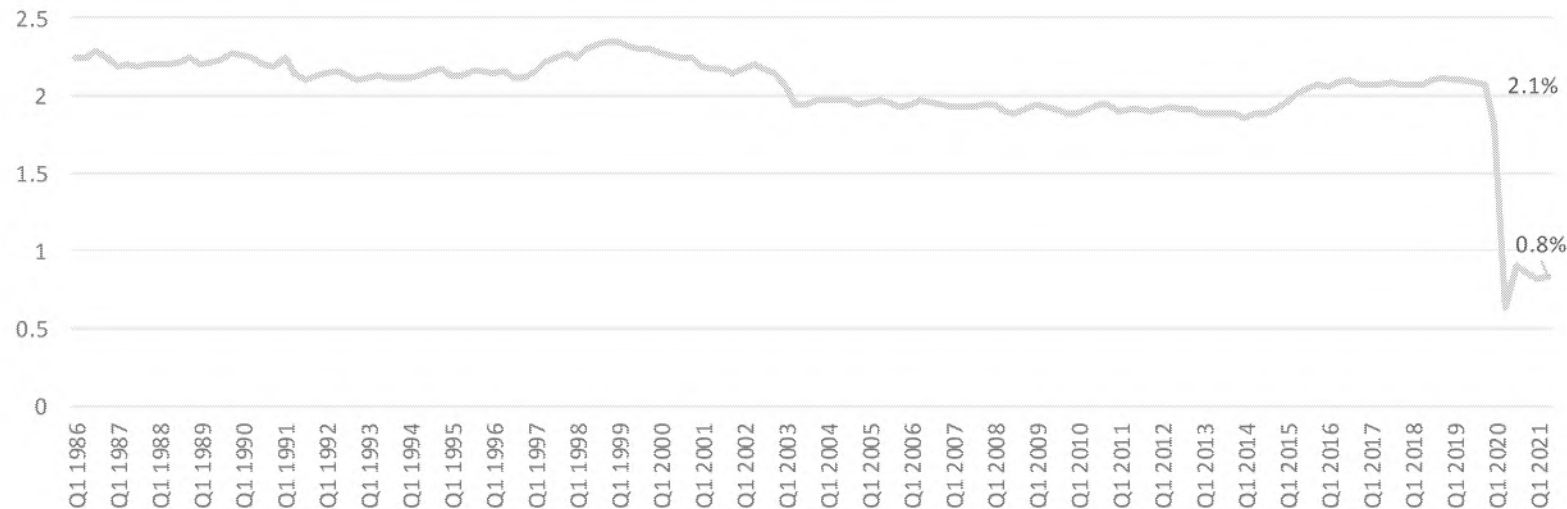


The resource sector is the most productive, followed by utilities and some service sectors requiring skilled labour.

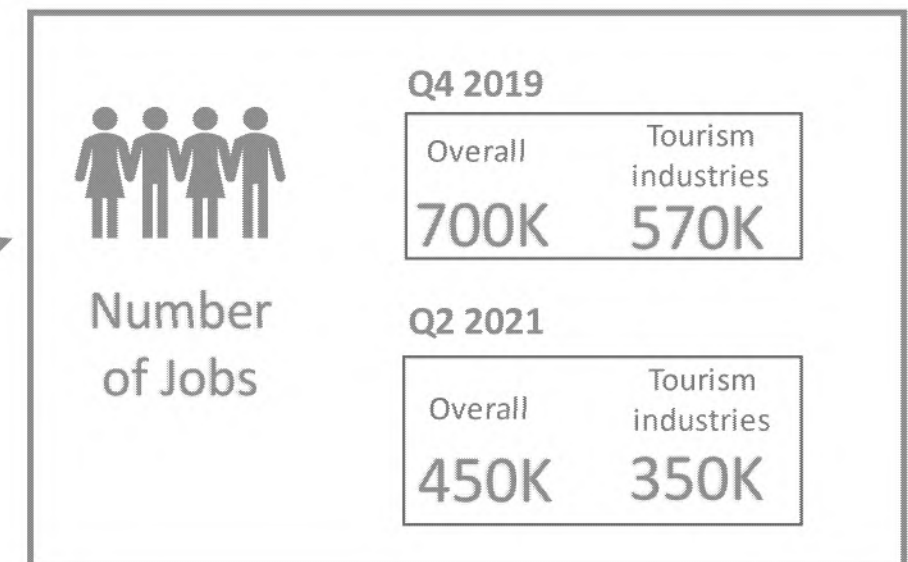
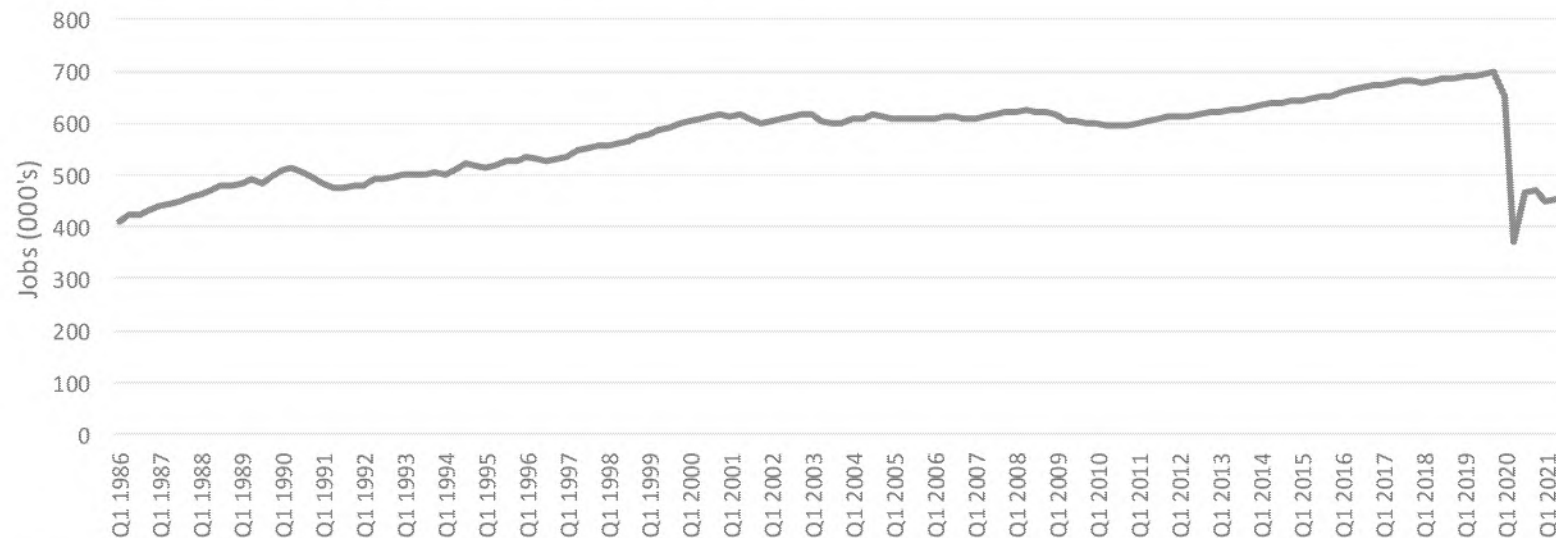


In contrast to the overall economic picture, economic activity and employment in the tourism sector remain well below their historical levels

Tourism's share of Canadian GDP (%)



Employment generated from tourism

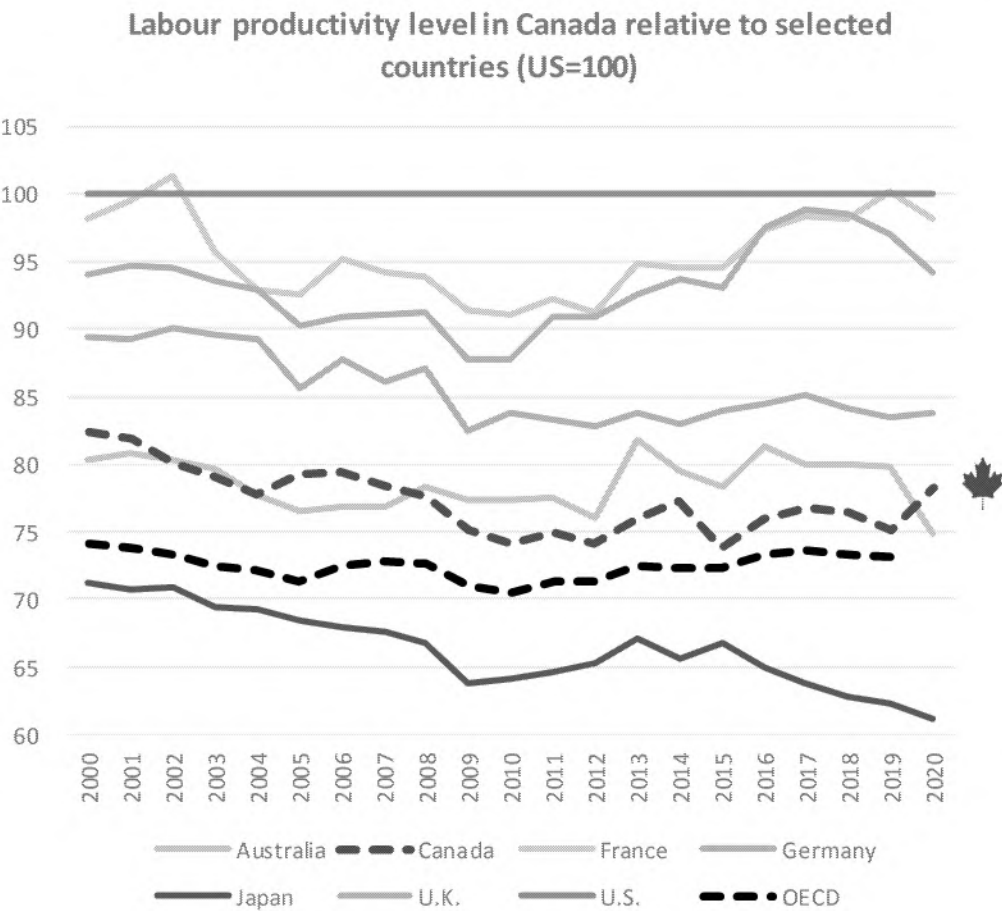


For many decades, Canada underperformed relative to its peers in terms of labour productivity and innovation performance

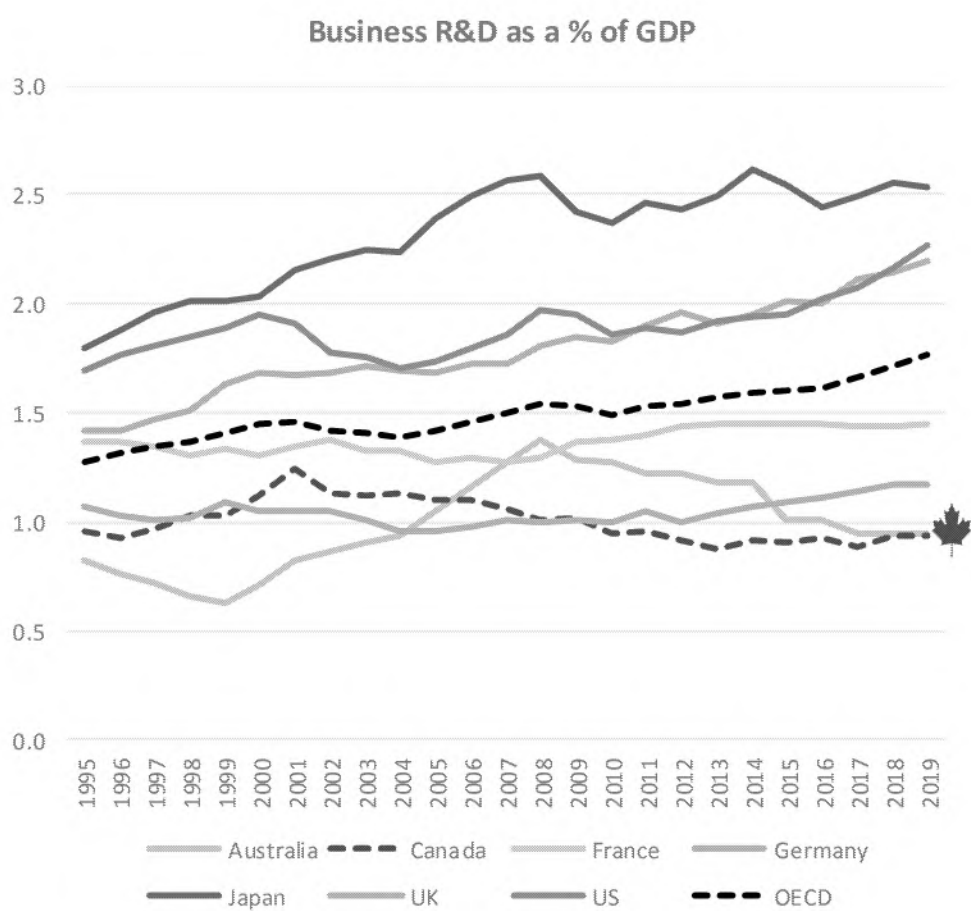


Despite lagging in level, productivity growth in Canada was close to US growth in the past decade.

Canada is not a top performer in innovation, technology adoption and R&D, which could hold back productivity from catching up.



Source: OECD Productivity Statistics Database; updated July 12 2021.



Source: OECD Main Science and Technology Indicators (updated Sept 15 2021); Statistics Canada (updated Aug 24 2021).

Canadian firms in comparison to the OECD

- 21st Business expenditure R&D (2019)
- 22nd Cloud computing (2019)
- 10th E-commerce (2019)
- 19th SME digitalization since onset of COVID

Source: OECD, Statistics Canada



Headwinds are also weighing on the Canadian economy

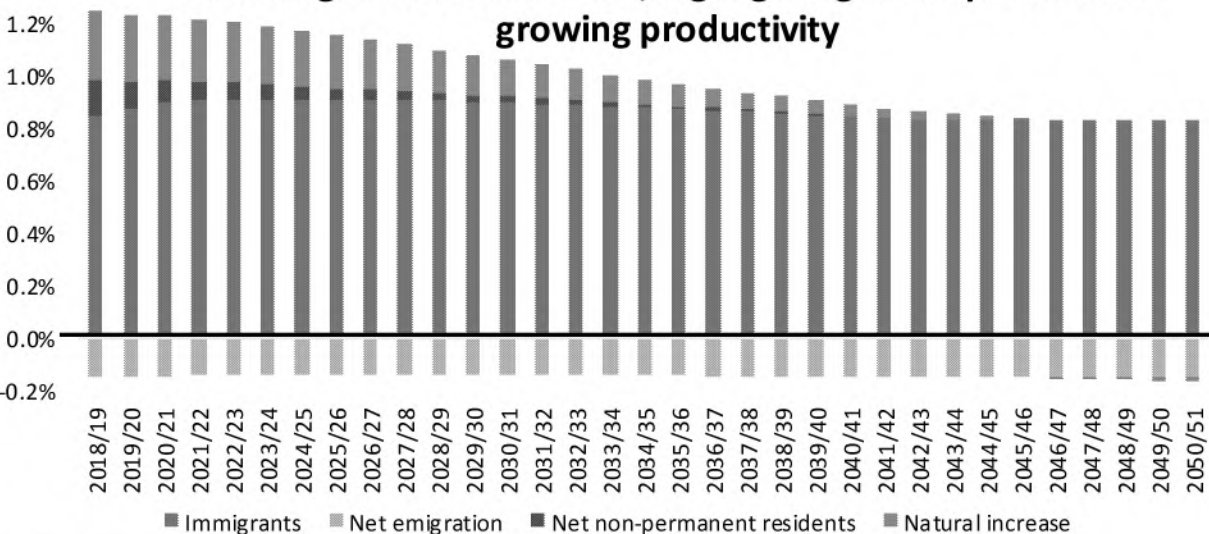
- Demographic forces
- Decline in competitiveness
- Transition to low carbon

Canada's share of US goods imports steadily decreased over the last two decades



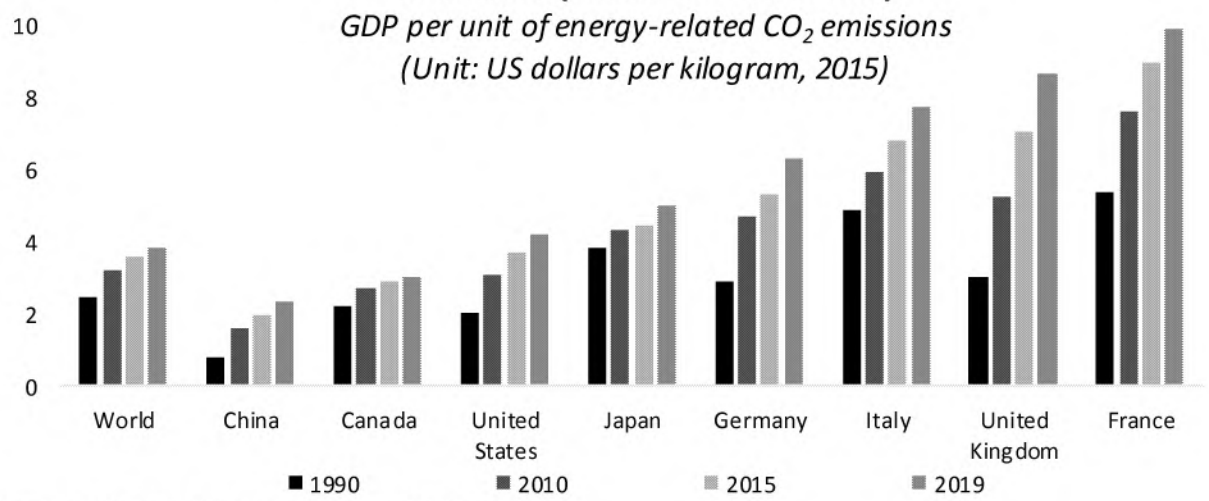
Source: United States International Trade Commission; updated Jun 29 2021.

Canada's population growth is expected to depend entirely on immigration in the 2040s, highlighting the importance of growing productivity



Source: Statistics Canada; updated Sept 17 2021

Canada has a more carbon intensive economy that creates less wealth per unit of CO₂ emitted compared to most OECD countries (ranks 36th out of 38)

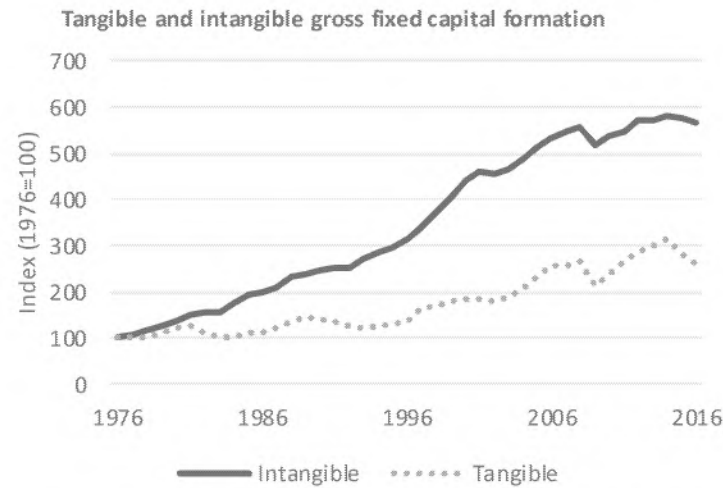


Source: OECD Green Growth Database; updated Dec 2020



The intangible economy is growing fast, and digital transformation will be a key factor in unlocking Canadian productivity and competitiveness

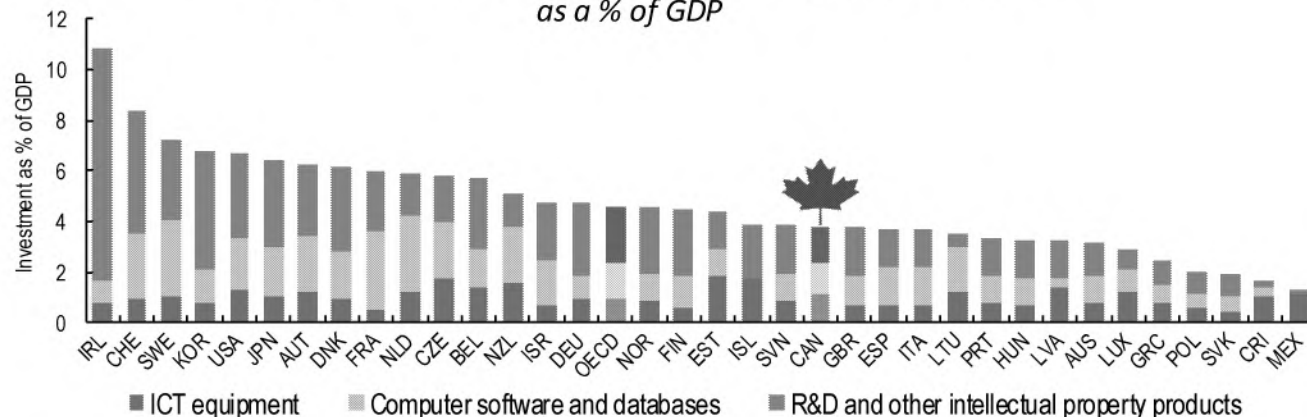
In Canada, and elsewhere, investments in intangibles have outpaced investment in physical assets.



Source: Statistics Canada 2020, Business Sector Intangible Capital and Sources of Labour Productivity Growth in Canada

However, Canada has lagged its OECD peers in investments in intangibles and digital technologies.

Investment in ICT equipment and key intangible assets, 2017
as a % of GDP



Source: OECD 2019, Measuring the Digital Transformation

Nevertheless, businesses in Canada adapted to the pandemic by accelerating use of digital technologies.

Retail Trade and E-commerce Sales



Source: Statistics Canada; updated Oct 22 2021

Proportion of businesses who adopted or incorporated new digital technologies in 2020

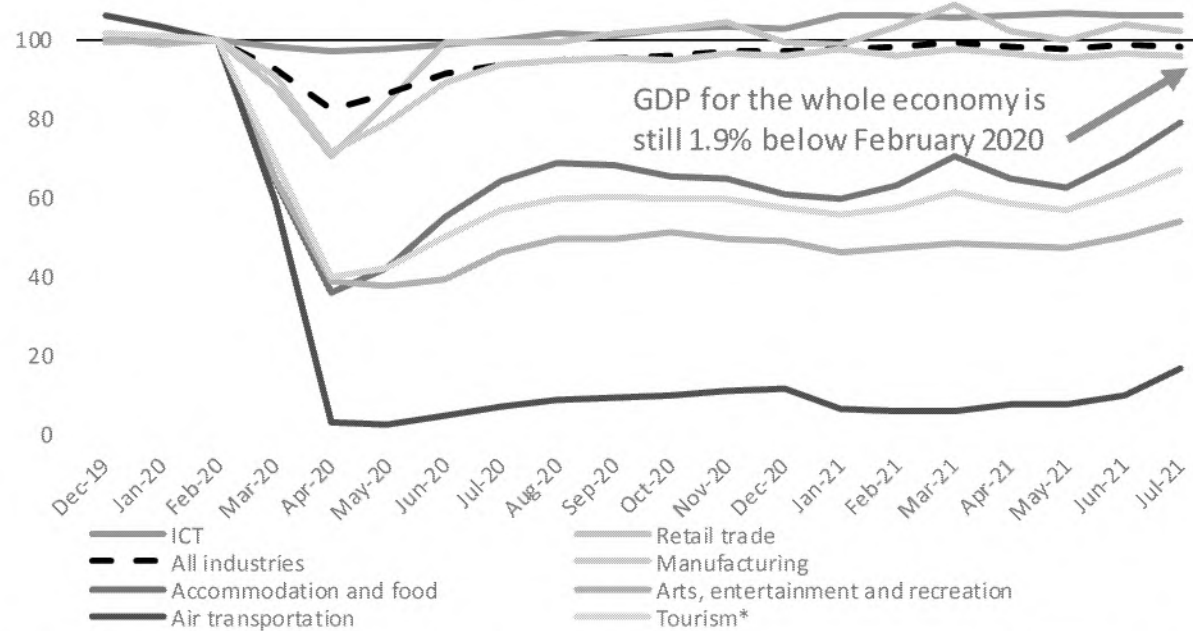


Source: Statistics Canada Canadian Survey on Business Conditions, 2021 Q1



The impact of the pandemic remains uneven across sectors, and the recovery is expected to take some time

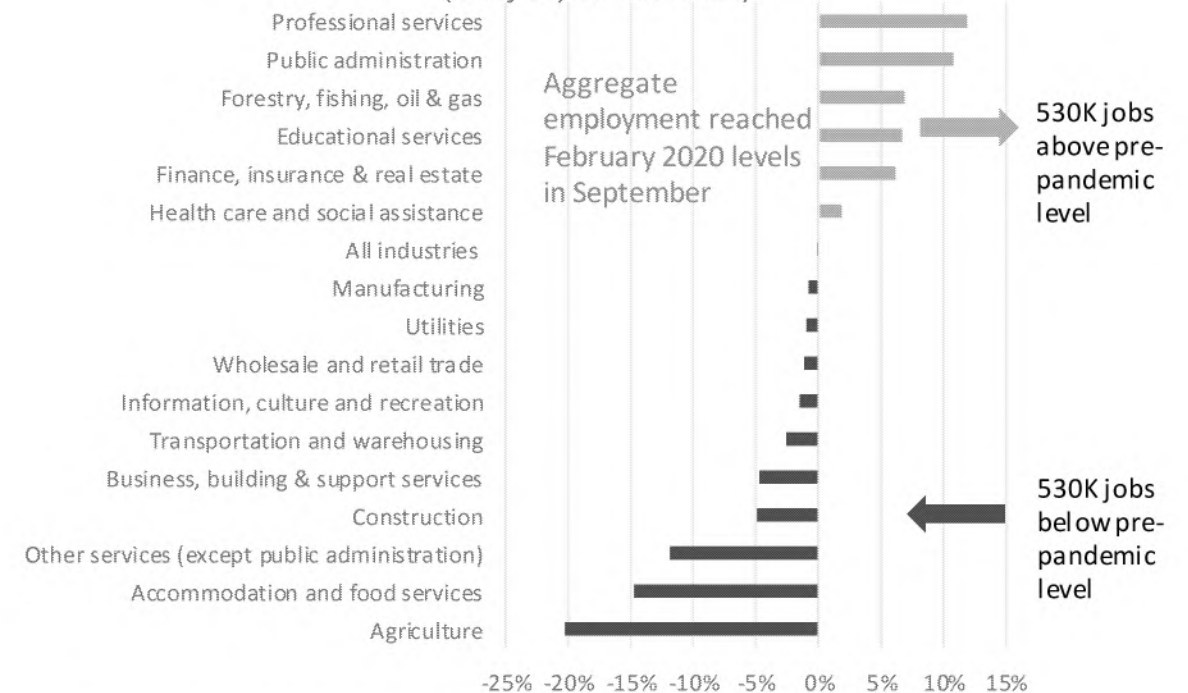
The recovery is under way in most sectors, but remains depressed in sectors involving high-contact services
(GDP Index February 2020 = 100)



Source: Statistics Canada, updated Oct 1 2021

Last date: July 2021

Employment has recovered in a few sectors
(as of September 2021)



Source: Labour Statistics Canada, updated Oct 8 2021

While under way, there are indications the recovery could take time:

- The level of economic activity in hard-to-distance sectors (e.g. tourism-related industries) remains well below pre-pandemic level.
- Supply chain issues may persist and weigh on Canadian exports and imports.
- Many sectors are currently experiencing labour shortages, and the number of long-term unemployed remains elevated.
- There remains uncertainty around the evolution of the pandemic and possible further waves.

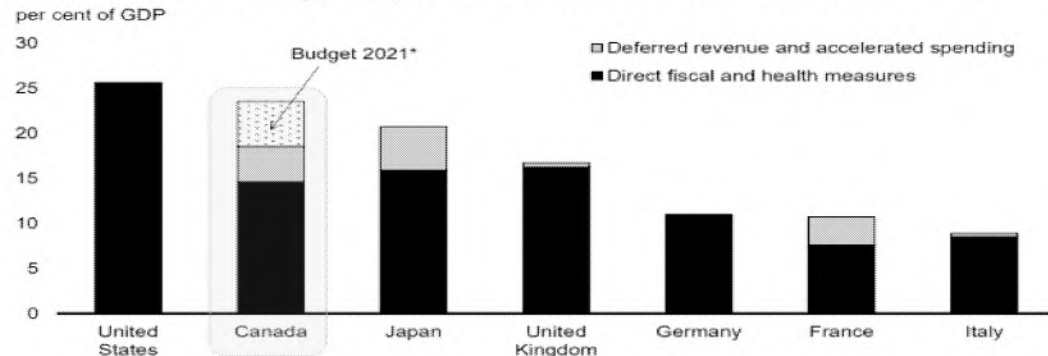
What's up with inflation?

- Inflation reached 4.4% (year-over-year) in September 2021, the fastest pace since February 2003.
- While inflation is expected to ease towards the middle point (2%) of the Bank of Canada's target range, inflation may remain high in the coming months.
- Temporary factors pushing up inflation include higher gasoline, food and home prices. Issues with supply chains also contributed to high inflation in September, reflected in higher prices for passenger vehicles due to shortages of semiconductor chips.



Canada provided significant support to firms to navigate the pandemic, the majority of it through wage subsidy and interest-free loans

Significant Fiscal Policy Support Announced across G7 Countries

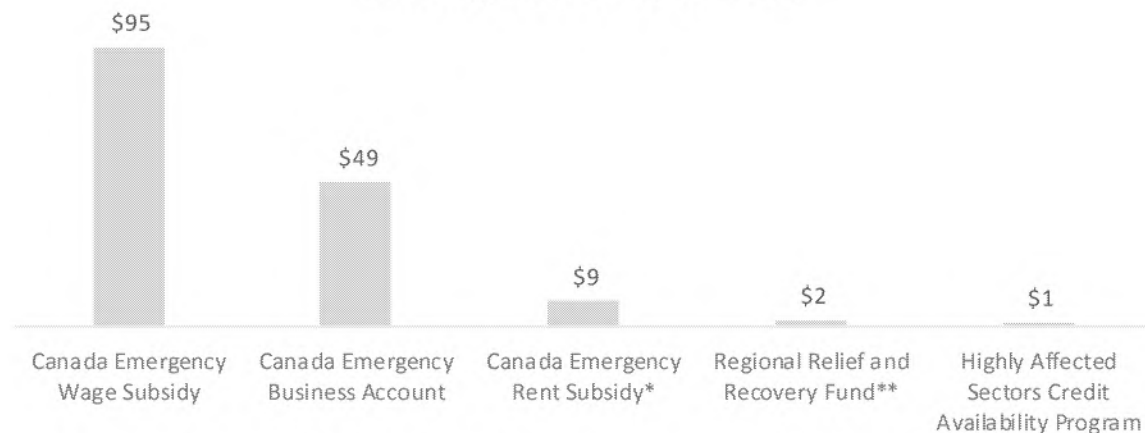


Notes: The timeframe for the announced measures is country-specific. Excludes the proposed *American Jobs Plan* for the U.S. (unveiled March 31, 2021) and Germany's supplementary budget for 2021 and Budget 2022 planned net new borrowing (unveiled March 24, 2021).

* Includes commitments made in Chapter 3 of the 2020 *Fall Economic Statement* and policy actions since, including Budget 2021.

Source: International Monetary Fund, April 2021 *Fiscal Monitor*, includes announced measures as at March 17, 2021; Department of Finance Canada calculations.

Funding to date (\$ Billions)



Note: Funding figures as of October 10, 2021 (CEWS, CERS), October 7, 2021 (CEBA), June 30 2021 (HASCAP).

*Includes support from both the Canadian Emergency Rent Subsidy and its predecessor (Canadian Emergency Commercial Rent Assistance)

**Value is total funding for the program; other program values are for approved claims.

Industries receiving the most support in terms of dollar values were harder hit (e.g., accommodation and food services) or employing workers paid higher wages (e.g., manufacturing).

Uptake (share of firms claiming support) was widespread across the economy and especially high in hard-hit sectors.

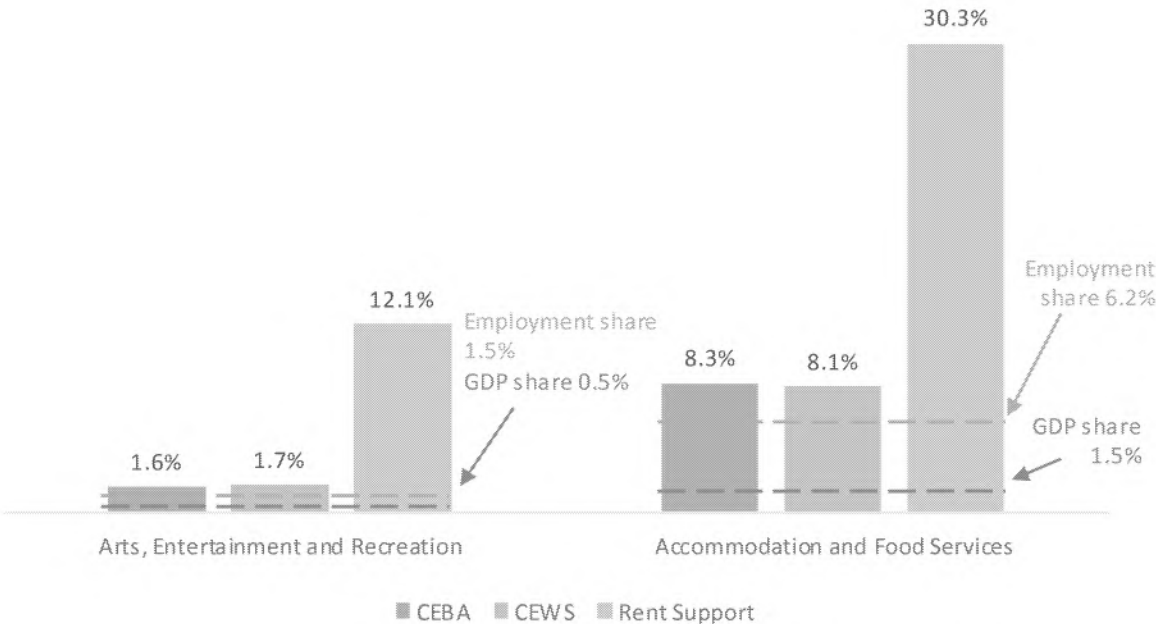
	Share of Total Funding	Uptake by Employer Businesses			
		CEWS	CEBA	CERS	
Agriculture, mining, oil and gas, utilities	5%	25%	54%	2%	
Construction	13%	34%	55%	4%	
Manufacturing	13%	51%	56%	17%	
Professional services	10%	27%	47%	7%	
Accommodation and food services	9%	54%	70%	42%	
Retail trade	9%	36%	61%	19%	
Management and admin services	8%	31%	49%	9%	
Education and health	7%	40%	57%	17%	
Wholesale trade	6%	43%	54%	13%	
Transportation and warehousing	6%	20%	55%	3%	
Other services	5%	36%	57%	22%	
Finance and real estate	5%	17%	38%	4%	
Arts, entertainment and recreation	2%	46%	58%	25%	
Information and cultural	2%	36%	48%	11%	

Note: Share and uptake % based on ISED internal analysis on CEWS, CEBA, CERS and CECRA program data linked to tax data as of Feb 15, 2021, Jan 26 2021, Apr 12 2021, and Mar 14 2021.



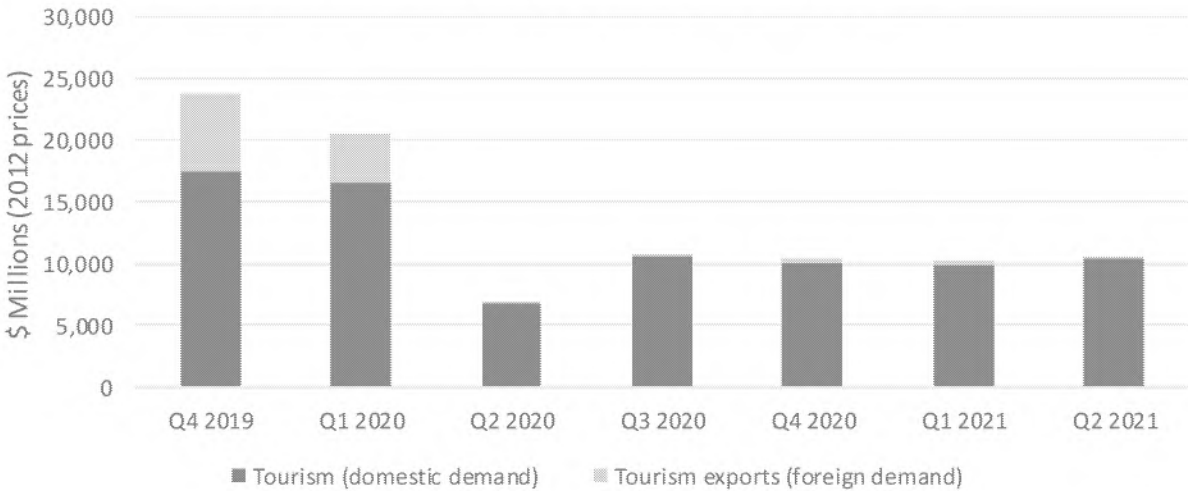
Program Support was critical for the tourism sector, but it is still struggling as it desperately needs a return in demand from both domestic and foreign tourists

Tourism-related industries were hard-hit in the pandemic, and account for a higher share of emergency support relative to GDP or Employment.



Note: Share and uptake % based on ISSED internal analysis on CEWS, CEBA, CERS and CECRA program data linked to tax data as of Feb 15, 2021, Jan 26 2021, Apr 12 2021, and Mar 14 2021.

Partial recovery in domestic demand, foreign demand has not started to recover



Source: Statistics Canada National Tourism Indicators; updated Sept 29, 2021

Non-resident Arrivals up in September following relaxing border restrictions

	Sept 2019	Sept 2020	Sept 2021
	1.1M	64.7K	328.2K
	Sept 2019	Sept 2020	Sept 2021
	838.7K	21.5K	243.5K

Border opened to fully vaccinated US residents on August 9, and to all fully vaccinated travellers on September 7



Small businesses are economically important and were hard hit by the pandemic

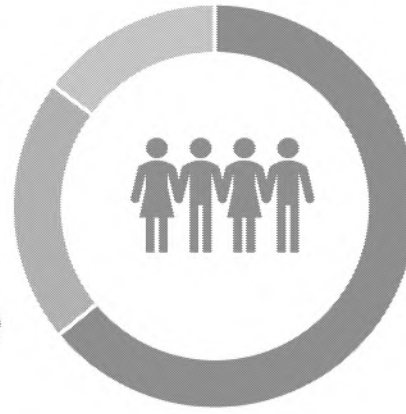
Vast majority of businesses are small (98% have less than 100 employees); these businesses employ 64% of workers.

Distribution of Employer Businesses, 2020



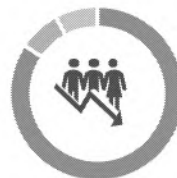
- Small (1-99 employees)
- Medium (100-499 employees)
- Large (500+ employees)

Distribution of Employment, 2020



Small businesses accounted for 36% of net employment growth from 2014–2019....

... and, 84% of the decline from 2019–2020.



In 2020, 90% of exporters were small businesses...

... and, accounted for 20% of the value of exports.



Source: ISSED. Key Small Business Stats 2021 (forthcoming).

Smaller businesses had higher uptake of CEBA loans, which helped them maintain liquidity during the pandemic.

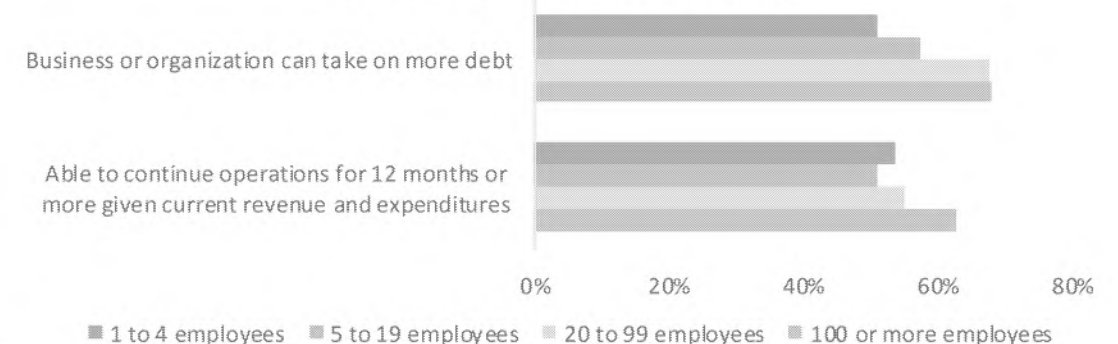
Uptake of Program Support by employee size class



Note: Share and uptake % based on ISSED internal analysis on CEWS, CEBA, CERS and CECRA program data linked to tax data as of Feb 15, 2021, Jan 26 2021, Apr 12 2021, and Mar 14 2021.

Despite support, smaller businesses are less likely to be able to take on more debt and less likely to have revenues capable of sustaining their operations.

Business Stability (Survey, Q3 2021)



Source: Statistics Canada. Canadian Survey on Business Conditions, Q3 2021.



Business outlook has improved, but many businesses remain in a tenuous position

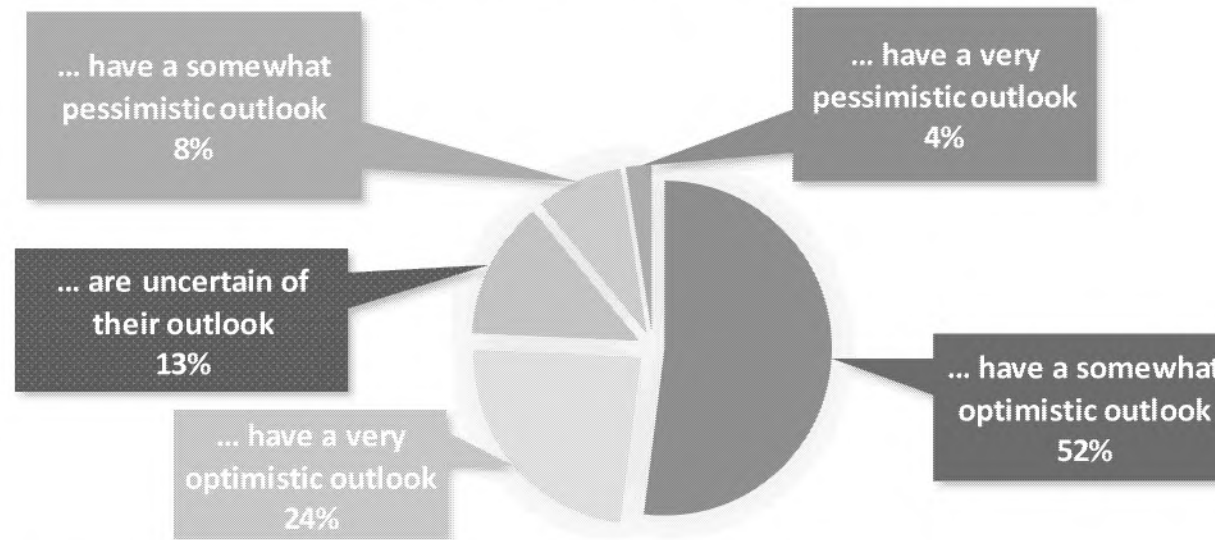
Canadian Survey on Business Conditions—Q3 2021

Overall conditions and business sentiment have improved in 2021; a majority of firms report positive prospects.

However, some businesses remain unable to take on debt and may not be able to continue operations under a protracted *start-stop* recovery.

Labour shortages and rising input costs were the most commonly cited near-term obstacles. This coincides with a surge in job vacancies in Q2 of 2021 (25% increase leading to record high 730K vacancies).

Business Outlook: Over the next 12 months, firms ...



Business Survival



- 19.0%** reported that they **were unable to take on more debt**
- 17.7%** reported that they can continue to operate at their current level of revenue and expenditures for **less than 12 months** before considering **laying off staff**
- 6.8%** reported that they can continue to operate at their current level of revenue and expenditures for **less than 12 months** before considering **closing or declaring bankruptcy**



Businesses with < 20 employees



Tourism-related industries



More pessimistic outlook



Less able to take on more debt



Less likely to be able to operate for 12+ months under current conditions



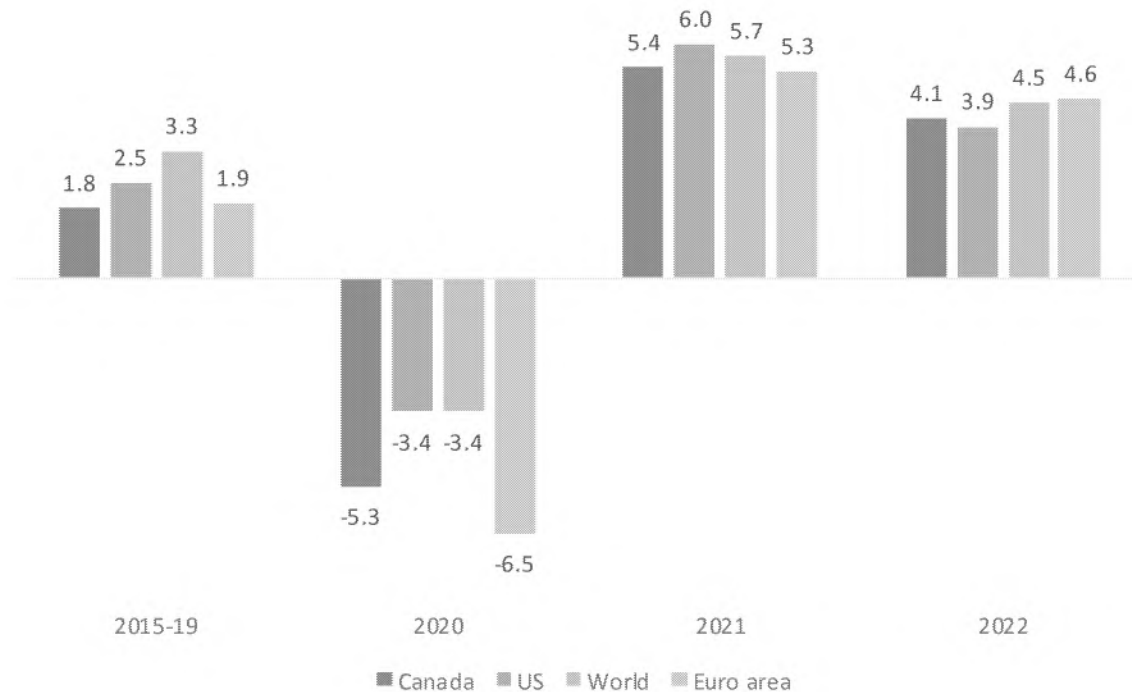
Tourism related industries experiencing large labour shortages



While medium-term growth prospects for Canada are encouraging, the full extent of the impact of the pandemic is not yet known

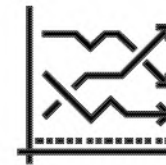
GDP forecast for Canada are generally positive. Canadian growth is expected to match other OECD economies.

Growth is expected to be strong over the next two years
Annual GDP growth (%)



Source: OECD, Economic Outlook Interim Report (September 2021).

What has the pandemic changed?



Over the short term, some hard-hit sectors are still reliant on direct support; labour shortages are hampering the recovery in many sectors; and inflation is currently unusually elevated, higher than in the last decade.



Accelerated adoption of digital technologies, including clean technologies, could act as a catalyst for business investment, productivity growth, and innovation.



As a small open economy, Canada could be suffering from world-wide reorganization of supply chains that were disrupted by the pandemic.



The way of work, including automation and teleworking, could impact labour market participation, skill accumulation and mismatch, and ultimately labour productivity.



Demographic forces are likely to limit long-term growth and living standards prospects. This requires strong labour market participation, including from underrepresented groups and those most affected by the pandemic.



Regional economic snapshot



Territories

Demographics

- Young, highly dispersed population; average median age of 33 years (41 years for Canada)
- Large Indigenous population: NU – 86%, NWT – 51%, YT – 23%

Economy

- Strong projected growth, with forecasted averages of 12.3% in 2021 and 3.1% in 2022 (significantly weaker forecasts for NWT)
- Much of Canada's natural resource potential lies in the territories (76% of projects north of 60 are undeveloped, including many critical materials)
- Opportunities to diversify through expansion of the blue economy and tourism
- Increased international interest in the region

Pacific

Demographics

- 14% of Canada's population (5.1 million)
- Highest annual growth among four largest provinces since 2017 (1.4% per year)
- Diverse: 30.2% visible minority population relative to 22.2% in all of Canada

Economy

- Real estate was 20% of BC GDP in 2020, highest in Canada
- Resource industries (mining, forestry, natural gas) are major rural employers. Trends of interest in these industries include the matter of Indigenous jurisdiction, commodity price changes, and environmental considerations.
- Strengths in innovative sectors (digital, clean tech, life sciences) with success stories/unicorns
- Customer-facing industries (tourism, retail) struggling with ongoing pandemic, debt, and labour shortages

Prairies

Demographics:

- Population over 7 million (4.4 million in AB), about 20% of population in Canada
- Diverse: 39% of Canada's Indigenous population

Economy

- Accounts for 26% of Canada's exports
- Rich in natural resources and prominent agriculture sector
- Hardest hit GDP in 2020, above national average post-pandemic growth

Northern Ontario

Demographics

- Dispersed and aging, with minimal population growth
- High proportion of Francophone Canadians and strong Indigenous presence

Economy

- Resource-base, but emerging sectors, particularly in digital and battery electric vehicles (BEV), are becoming more important in the mining and related sectors but labour shortages in skilled trades continue
- Inadequate connectivity in many communities is also a barrier to economic growth

Quebec

Demographics

- 23% of Canada's population
- Quebec's share of all immigrants admitted to Canada was 11.9% in 2019
- Employment growth forecast of 4.2% in 2021

Economy:

- Major innovative clusters e.g. clean energy, aerospace, life sciences, zero-emissions vehicles, ICT, AI, aluminum and maritime
- Quebec-based firms received 24% (\$599M) of Canada's venture capital share in 2020
- Well-established networks of R&D centres/consortiums and technology transfer offices and highest BERD per capita
- Average masks multiple realities: urban/rural, connectivity, job types/creation

Southern Ontario

Demographics

- 36% of Canada's population; attract about 40% of newcomers to Canada
- 1.6 million people live below Canada's poverty line in Ontario (42% of total)

Economy

- Ontario is about 39% of Canada's GDP; 4% growth forecast in 2021 and 2022
- Rapidly growing tech sector with record-setting VC activity, and a number of companies reaching unicorn status. The ICT sector is leading this growth.
- Key cluster strengths in areas of global demand (e.g. AI, cleantech, fintech, digital health, digital education, regenerative medicine)

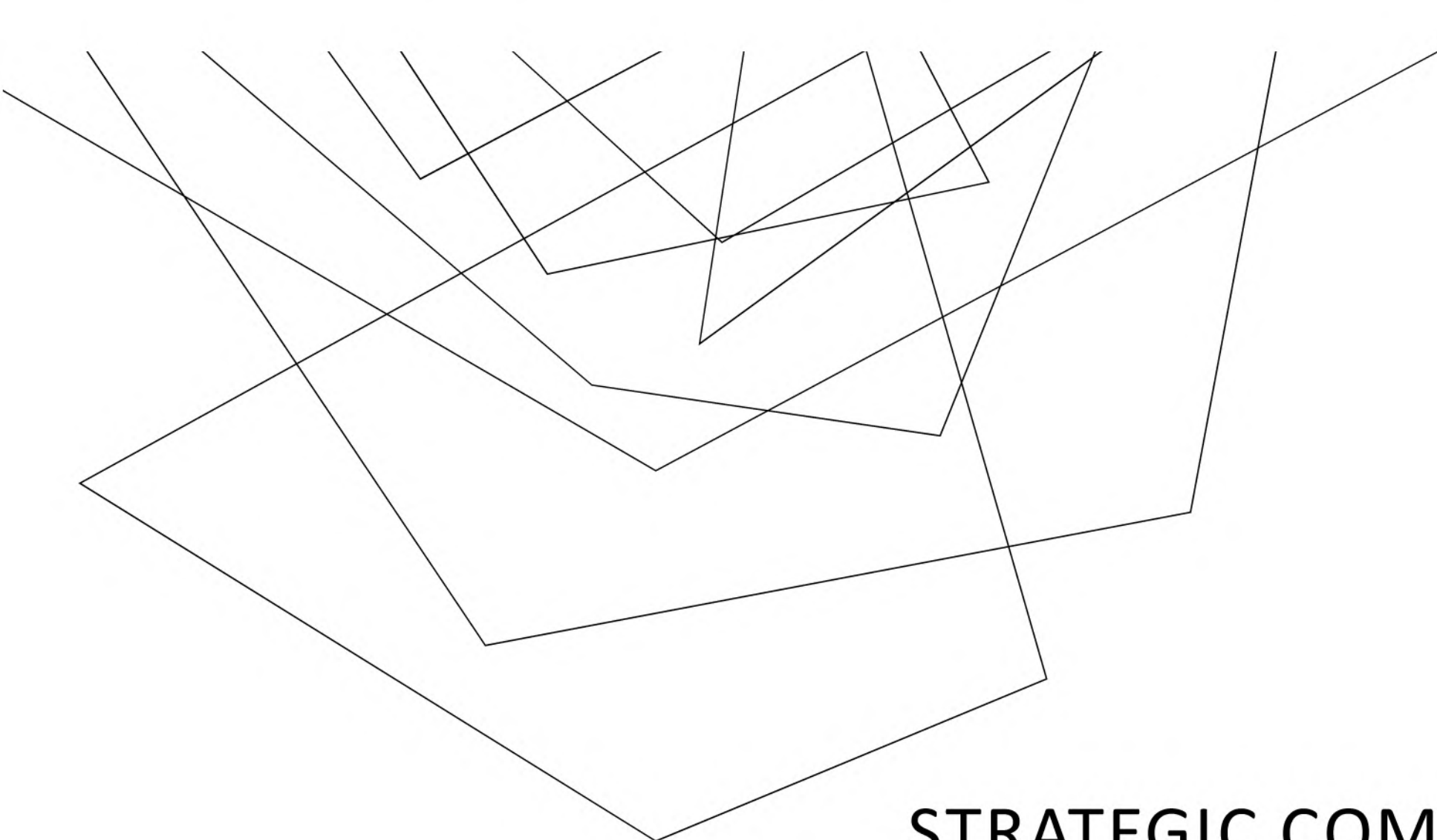
Atlantic Canada

Demographics

- Population of 2.5 million
- Low immigration retention and fastest aging population in Canada
- Highest share of rural population in Canada: 46%

Economy

- Significant export decline in 2020 (-22.5%), especially in NL (-29.4%)
- Strong growth potential in sectors such as ICT, life and biosciences, oceans and clean technologies, food, tourism, mining, and aerospace and defence
- Critical shortage of labour and skills, especially in rural areas; 55% of Atlantic firms reporting hiring difficulties

A large, abstract graphic consisting of several thin, black, overlapping lines that form a complex, geometric shape, resembling a stylized 'V' or a series of interconnected triangles, positioned on the left side of the page.

STRATEGIC COMMUNICATIONS AND MARKETING





STRATEGIC COMMUNICATIONS AND MARKETING

ISED's communications services will work hard to help you communicate how the Government is supporting the Canadian economy, businesses, and consumers.

Ministerial Services

The Ministerial Services team works closely with the ministers' offices, deputy ministers' offices, regions, portfolio partners, sector colleagues, and stakeholders to develop communications products and coordinate other activities relating to public events. The team provides strategic communications advice that helps drive results of key mandate commitments, with resources devoted to:

- **Ministerial liaison**
- **Media relations**
- **Media monitoring**
- **Parliamentary affairs**
- **Issues management**
- **Speechwriting**
- **Strategic advisory services**
- **Portfolio partners**

Digital Media and Marketing

The Digital Media and Marketing team supports departmental and ministerial priorities through public opinion research and marketing, as well as editorial and creative services. The team also manages the Department's social media and web channels, as well as its national contact centre. Resources include:

- **Public opinion research / consultations**
- **Marketing**
- **Editorial services**
- **Creative services**
- **Social media**
- **Corporate communications**
- **Web communications**
- **National contact centre**



Social Media and Web

* Engagement source: Hootsuite Analytics (Sept. 1, 2020, to Aug. 31, 2021)

SOCIAL MEDIA CHANNELS

Over 578K followers across 25 accounts (English and French)

Canadian Tourism



Followers: 15K
Engagement: 3.7K



Fans: 6K
Engagement: 3.4K

Canadian Innovation



Followers: 42.5K
Engagement: 17.2K



Fans: 15.8K
Engagement: 20.4K



Fans: 8K
Engagement: 1.7K



Followers: 92K
Engagement: 25K



Subscribers: 14K

Canadian Science



Followers: 9.4K
Engagement: 5.4K



Fans: 67K
Engagement: 4.7K



Fans: 9.7K
Engagement: 2.1K

Canada Business



Followers: 183.9K
Engagement: 10.6K



Fans: 101K
Engagement: 23.8K



Fans: 14.3K
Engagement: 14.5K

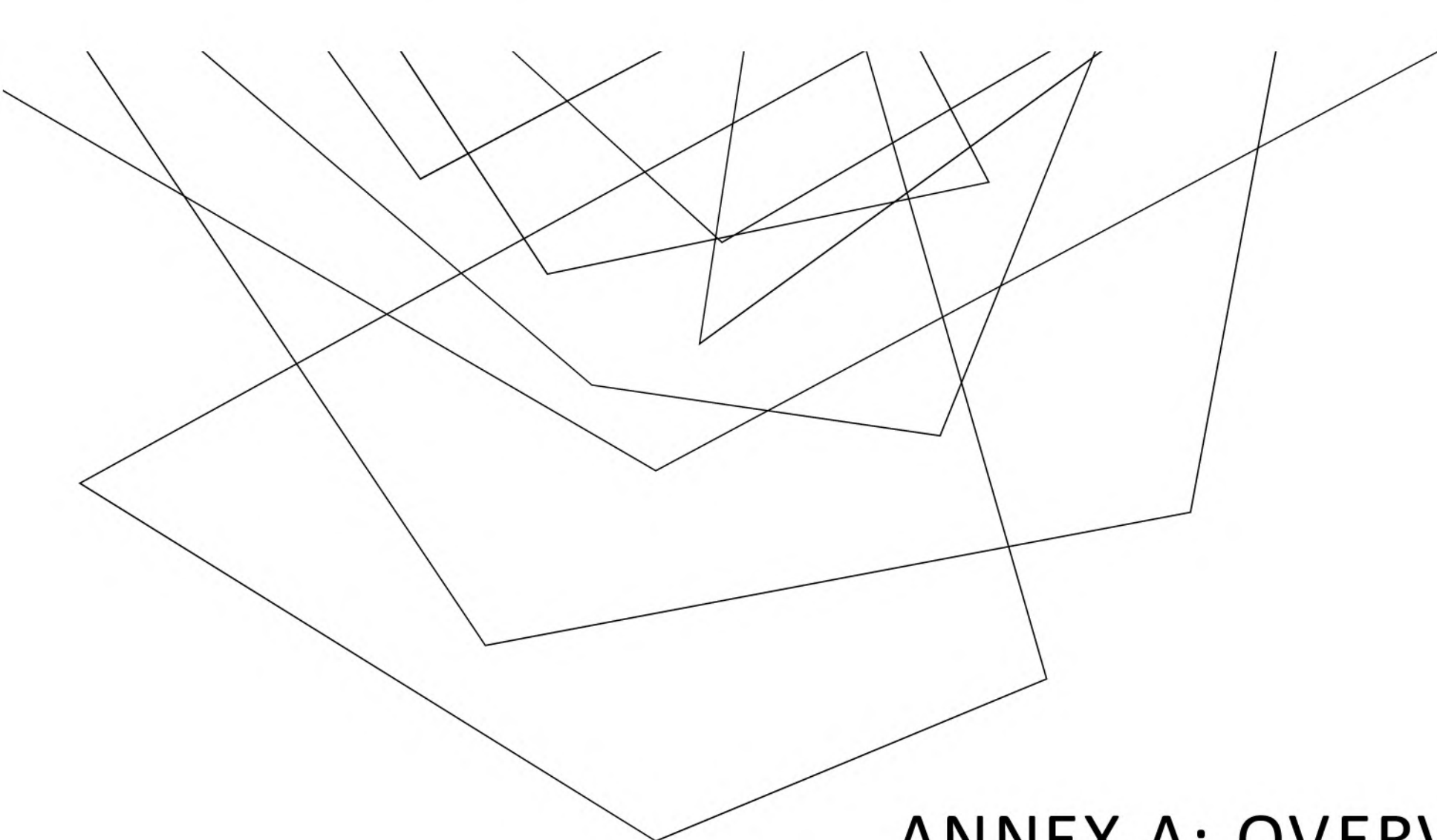
WEB PRESENCE

ic.gc.ca: more than 47K web pages

- 20.2M+ visits
 - 80+ online applications
- * From Sept. 1, 2020, to Aug. 31, 2021

ISED manages three themes on Canada.ca:

- [Business and industry](#)
- [Science and innovation](#)
- [Money and finances](#)

A large, abstract graphic consisting of several thin, black, overlapping lines that form a complex, geometric pattern. The lines intersect to create various shapes, including triangles and polygons, and are positioned in the upper left and center of the page.

ANNEX A: OVERVIEW OF PORTFOLIO BODIES WITH KEY LINKAGES TO YOUR MANDATE





PORTFOLIO BODIES WITH KEY LINKAGES TO YOUR MANDATE

- Destination Canada
- Regional Development Agencies (outside ISED portfolio)
 - Atlantic Canada Opportunities Agency
 - Canada Economic Development for Quebec
 - Federal Economic Development Agency for Northern Ontario
 - Federal Economic Development Agency for Southern Ontario
 - Prairies Economic Development Agency of Canada
 - Pacific Economic Development Agency of Canada
 - Canadian Northern Economic Development Agency



DESTINATION CANADA (DC)

Overview

DC works to sustain a vibrant and profitable Canadian tourism industry. It does so by conducting research on tourism trends and market opportunities, and marketing Canada as a tourism destination in the Americas, Europe, Asia, and Australia in order to grow tourism export revenues in markets where the Canada brand plays a leadership role. DC’s regional structure allows it to adjust its marketing programs to reflect changing market conditions and to capitalize on new marketing opportunities as they arise.



Marsha Walden
President and
Chief Executive Officer
Effective August 24, 2020



The Honourable Liza Frulla
Chairperson
Effective August 6, 2021

Governance

The President, Chairperson, and directors of the Board of DC are appointed by the Governor in Council on the recommendation of the responsible Minister. The President is responsible for DC’s day-to-day operations. The *Canadian Tourism Commission Act* identifies the Deputy Minister of ISED as ex-officio director.

Budget: \$96M*
FTEs: 117 (in 2021)
Headquarters: Vancouver, BC
**2021–2022 Main Estimates*



Destination Canada





MANDATE

- Destination Canada's (DC) role is to market Canada as a leading tourism destination

GOVERNANCE

- DC (legally known as the Canadian Tourism Commission) has been a federal Crown corporation since 2001 and reports to Parliament through the responsible Minister
- Headquartered in Vancouver since 2005
- President and Chief Executive Officer: Marsha Walden, effective August 24, 2020, until August 23, 2025
- Chair of the Board of Directors: The Honourable Liza Frulla, effective August 6, 2021, until August 5, 2026
- DC is governed by a Board of up to 12 directors who provide stewardship and strategic direction
 - The DC Board includes the President and Chief Executive Officer, the Chair, and the Deputy Minister of Innovation, Science and Economic Development, who is an ex-officio Board member



ROLES AND RESPONSIBILITIES

- In 2016, DC successfully launched a multiyear strategic partnership with all provinces, territories, the Indigenous Tourism Association of Canada, and 10 major Canadian city/resort destinations. This unified approach, known as North Star 22, has resulted in better alignment of investments and marketing decisions.
- Core business segments:
 - Leisure (Canada, Australia, China, France, Germany, Japan, Mexico, the UK, the US)
 - Business events
 - Research
 - Destination stewardship
- Uses a regional hub model, with offices in Canada, the UK, Japan, and China

IMPACTS OF COVID-19

- With impacts to the international travel industry due to COVID-19, DC pivoted a large portion of its internationally focused marketing activities to marketing in Canada.
- Budget 2021 further proposed an additional \$100M for marketing campaigns to help Canadians and other visitors discover and explore the country.



REGIONAL DEVELOPMENT AGENCIES (RDAS) (OUTSIDE THE ISED PORTFOLIO, WITH SEPARATE MINISTERS)

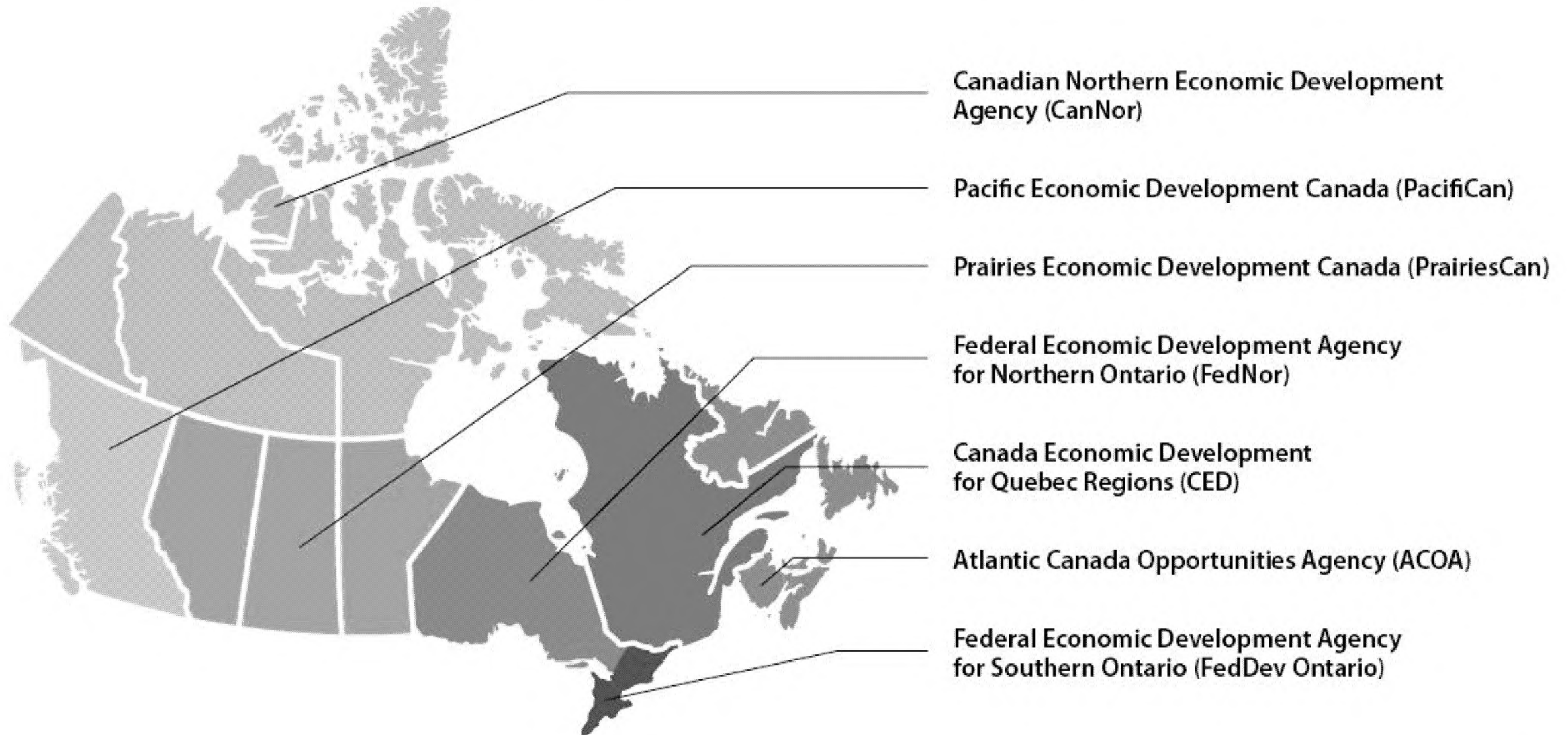
RDAs are the dedicated federal actors supporting the economic development of Canada's regions. They carry out their mandate through key activities tailored to local needs and regional realities:

- i) strategic investments in businesses (focus on business innovation, growth, exports);
- ii) support for regional ecosystem growth through intermediary organizations and bringing together economic actors; and
- iii) support for development and diversification of regional economies to foster community vitality.

The RDAs currently administer the Regional Economic Growth through Innovation (REGI) Program, which is a nationally coordinated, regionally tailored program focused on business productivity/scale up and regional innovation ecosystems. The nationally consistent program ensures that all Canadian businesses have the same access to necessary supports.



REGIONAL DEVELOPMENT AGENCIES (RDAS)





ATLANTIC CANADA OPPORTUNITIES AGENCY (ACOA)

Mandate

ACOA works to increase opportunity for economic development in Atlantic Canada and, more particularly, to enhance the growth of earned incomes and employment opportunities in that region. ACOA supports the Government's economic priorities by delivering programs to firms and communities and by advocating for the interests of Atlantic Canada. ACOA plays a convener role with federal, provincial, and other stakeholders to promote a collaborative, integrated approach.



Francis McGuire
President

Budget: \$346.8M*

FTEs: 584

Headquarters: Moncton, NB

**2021–2022 forecasted
expenditures*

Governance

The President is appointed by the Governor in Council and is responsible for the administration of ACOA's operations and its employees.



Atlantic Canada Opportunities Agency





ATLANTIC CANADA OPPORTUNITIES AGENCY



MANDATE

Objective: To support and promote opportunity for economic development in Atlantic Canada, with particular emphasis on small and medium-sized enterprises.

Legislated Mandate: To increase opportunity for economic development in Atlantic Canada and, more particularly, to enhance the growth of earned income and employment opportunities.

- **30 service points** throughout Atlantic Canada
- **Over the past decade** (fiscal years 2011–2012 to 2020–2021):
 - ACOA approved an annual **average of 1248 projects**.
 - The average **approved contribution** was **\$233,279**.
 - On average each year, ACOA assisted **973 businesses** and invested in **336 communities**.
 - On average, ACOA's **annual spending** was **\$276M**.
 - In the last full fiscal year (**2020–2021**), ACOA's actual spending was **\$575M**.
 - Approximately **\$496M in grants and contributions**
 - Nearly **\$79M in operating funds**

Supports the Government's economic priorities:

- Targeted, integrated, place-based approach
- Delivers programs to firms and communities
- Supports federal-provincial collaboration
- Provides intelligence on the Atlantic economy to various federal departments

Support is provided through:

- Flexible tools and programs
- Repayable contributions to businesses
- Non-repayable contributions to community and support organizations
- Convening and pathfinding



KEY ACTIVITIES

Under the direction of senior leaders, ACOA has been focusing its efforts and investments on key areas:

- Advanced manufacturing
- Food
- Green technology
- Immigration
- Indigenous economic development
- Ocean industries such as fisheries, aquaculture, and seafood processing
- Startup ecosystem
- Tourism

RESULTS SNAPSHOT

Sales by ACOA-assisted firms grew by an average of **3.9% per year**, compared to 0.9% for comparable firms.
(2020 Client Performance Report, ACOA)

Total exports by ACOA-assisted commercial firms totaled **\$2.4B** in 2017, up from \$1.9B in 2012, representing an average increase of 5% per year. *(2020 Client Performance Report, ACOA)*

For **every dollar** invested by ACOA in community projects, **other funding sources invested \$0.58.**



CANADA ECONOMIC DEVELOPMENT FOR QUEBEC REGIONS (CED)

Mandate

CED promotes the long-term economic development of the regions of Quebec by giving special attention to those where slow economic growth is prevalent or opportunities for productive employment are inadequate. CED promotes co-operation and complementarity with Quebec and communities in Quebec, working to respond to economic challenges unique to the Quebec regions. CED has knowledge and expertise of the realities of the various regions of Quebec and offers financial support and guidance to small and medium-sized enterprises and economic organizations in order to respond to issues as they are experienced on the ground.



Manon Brassard
Deputy Minister/President

Budget: \$642M*

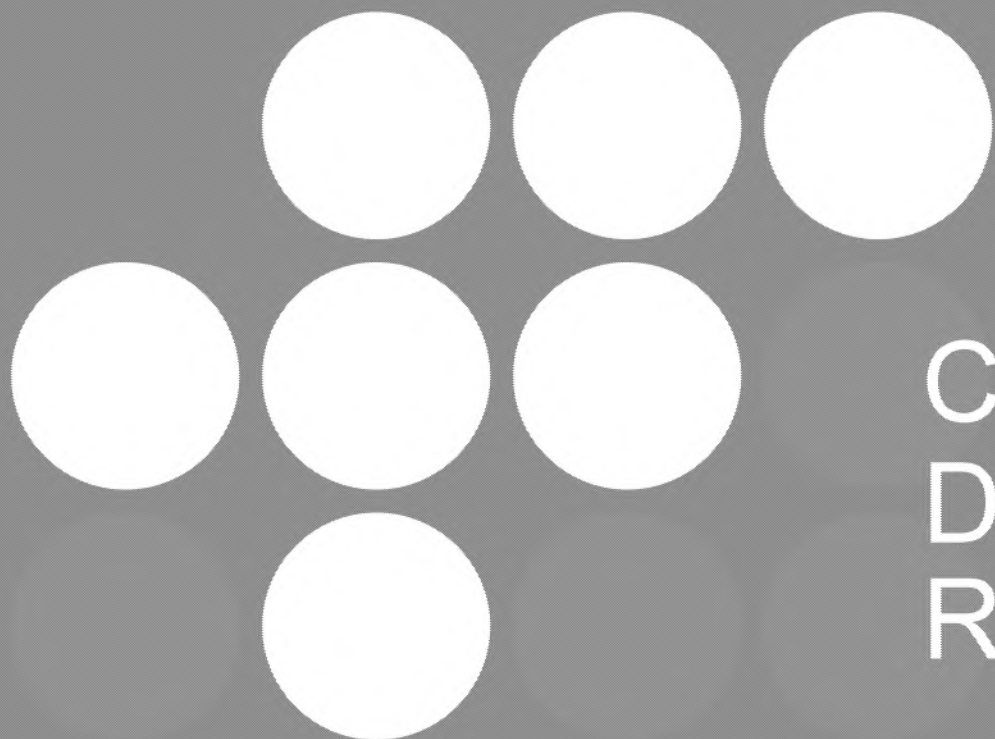
FTE: [390]

Headquarters: Montréal, QC

**Planned budget 2021-2022*

Governance

The President is appointed by the Governor in Council and is responsible for the administration of the Agency's operations and its employees.



Canada Economic Development for Quebec Regions

A federal asset anchored in Quebec, for Quebec



CANADA ECONOMIC DEVELOPMENT FOR QUEBEC REGIONS



**We are present in all regions of Quebec, at the heart of
distinct economic dynamics**

MISSION

“Promote the long-term economic development of the regions of Quebec by giving special attention to those where slow economic growth is prevalent or where opportunities for productive employment are inadequate.

Promote cooperation and complementarity with Quebec and communities in Quebec.”

- Section 10 of the *Economic Development Agency of Canada for the Regions of Quebec Act*

Our vision:

Promote equity of economic opportunity in all regions, maximizing their ability to thrive in the new economy.

Our focus:

Work on the factors of prosperity and vitality of the regions in order to create the conditions and the business climate for long-term economic growth, according to their realities.

Our approach:

- *place-based*, building on local assets and potential, and encouraging investments that benefit all
- *multi-dimensional and flexible*, integrating economic, social, institutional (cultural), and environmental dimensions to provide tailored solutions
- *Collaborative*, with a focus on coordinated approaches, based on local contexts and in consultation with the Government of Quebec, key stakeholders, and our federal partners.

**Head office in Montréal, QC
12 business offices in all
regions**

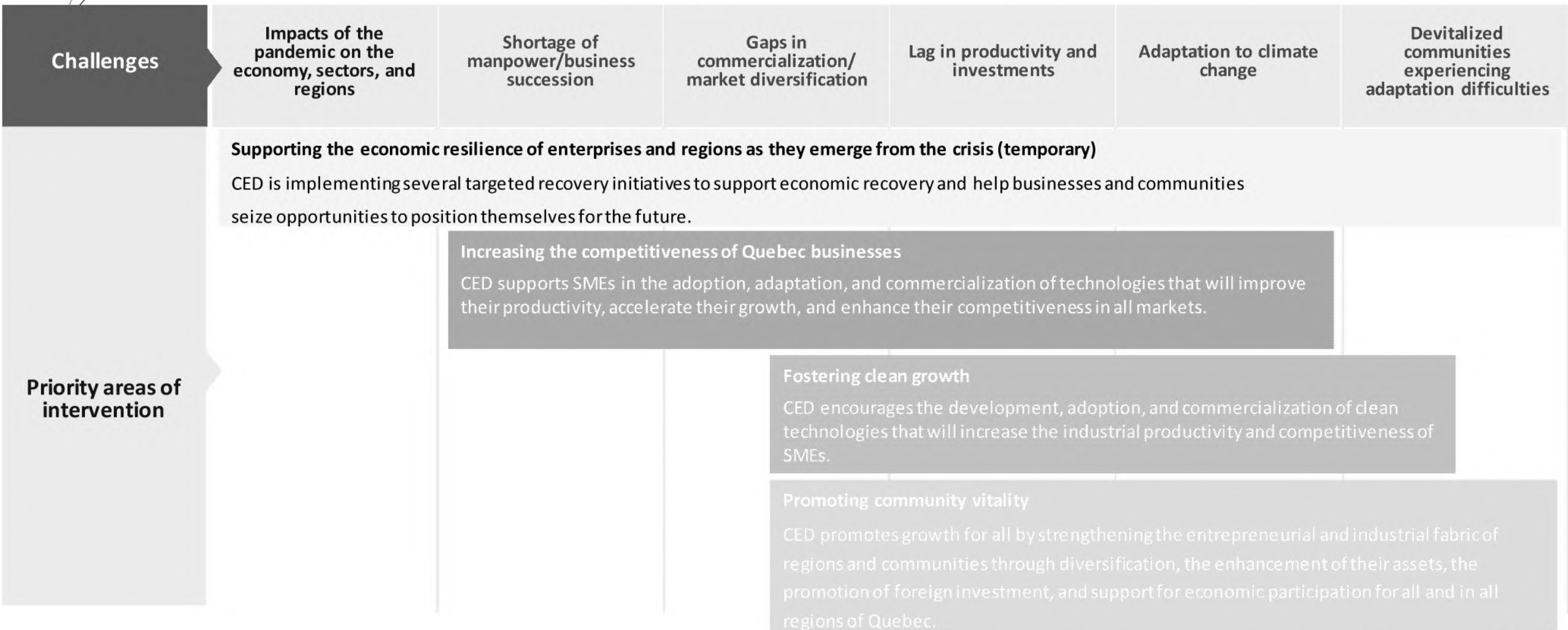
- On-the-ground knowledge of the factors influencing the development of each region
- Adapted financial support and accompanying through interventions focused on SMEs and the organizations that support them



CANADA ECONOMIC DEVELOPMENT FOR QUEBEC REGIONS



Our priority areas of intervention respond to the economic challenges of Quebec’s regions





FEDERAL ECONOMIC DEVELOPMENT AGENCY FOR NORTHERN ONTARIO (FEDNOR)

Mandate

FedNor was first created as a federal initiative in 1987 with a mandate to assist in the expansion and diversification of the economy of Northern Ontario. On August 12, 2021, FedNor was established as a stand-alone departmental agency, confirming the importance of its role. FedNor promotes economic growth through the delivery of regional and national grants and contributions programs. It focuses on outreach and collaboration efforts that engage local community leaders and stakeholders. As a new agency, FedNor is in the process of a transition and has not yet gone through its first financial reporting cycle.



Manon Brassard
Interim President

2021 Budget: \$162.1M

FTEs: 87

Headquarters: Sudbury, ON

Governance

The President is appointed by the Governor in Council and is responsible for the administration of the Agency's operations and its employees.



Federal Economic Development Agency for Northern Ontario





FEDERAL ECONOMIC DEVELOPMENT AGENCY FOR NORTHERN ONTARIO



MANDATE

FedNor was first created as a federal initiative in 1987 with a mandate to assist in the expansion and diversification of the economy of Northern Ontario.

On August 12, 2021, FedNor was established as a stand-alone departmental agency, confirming the importance of its role.

PRIORITIES

(Prosperity And Growth Strategy For Northern Ontario)

Driven by regional realities:

- Supporting Innovation
- Growing Companies
- Building Stronger Communities

PRESENCE

- Six offices across Northern Ontario
- 87 employees with deep knowledge of the region and varied expertise
- Serving a population of 877,000
- Northern Ontario encompasses 90% of Ontario's land mass

RESULTS – 2020-21



Approximately **11,100 jobs created or maintained** as a direct result of FedNor projects, including RRRF



Over **3,300 businesses maintained, expanded or created** as a direct result of FedNor projects, including RRRF



\$1.90 = Amount leveraged per dollar invested in community projects in Northern Ontario



Priorities that address economic challenges in Northern Ontario





FEDERAL ECONOMIC DEVELOPMENT AGENCY FOR SOUTHERN ONTARIO (FEDDEV ONTARIO)

Mandate

FedDev Ontario works to strengthen regional capacity for innovation, economic development, and growth by making targeted investments to create jobs and drive innovation in Canada’s most populous region. FedDev Ontario delivers three ongoing regional program streams: Business Scale-up and Productivity; Regional Innovation Ecosystem; and Community Economic Development and Diversification. The Agency also delivers ongoing national programs, as well as temporary national programs, including COVID-19 relief and recovery programs, and inclusive growth initiatives. FedDev Ontario also works to promote southern Ontario assets and brings together stakeholders to build collaborations and help businesses and organizations find the best support for their needs.



Nancy Gardiner
President

Planned 2021–2022 Budget:
\$634M*

FTEs: ~300* (as of
September 2021)

Headquarters: Waterloo, ON
Regional offices: Toronto,
Peterborough, and Ottawa

Governance

The President is appointed by the Governor in Council and is responsible for the administration of the Agency's operations and its employees.

*COVID-19 relief and recovery measures have temporarily increased the Agency's budget and FTEs over the next three years.

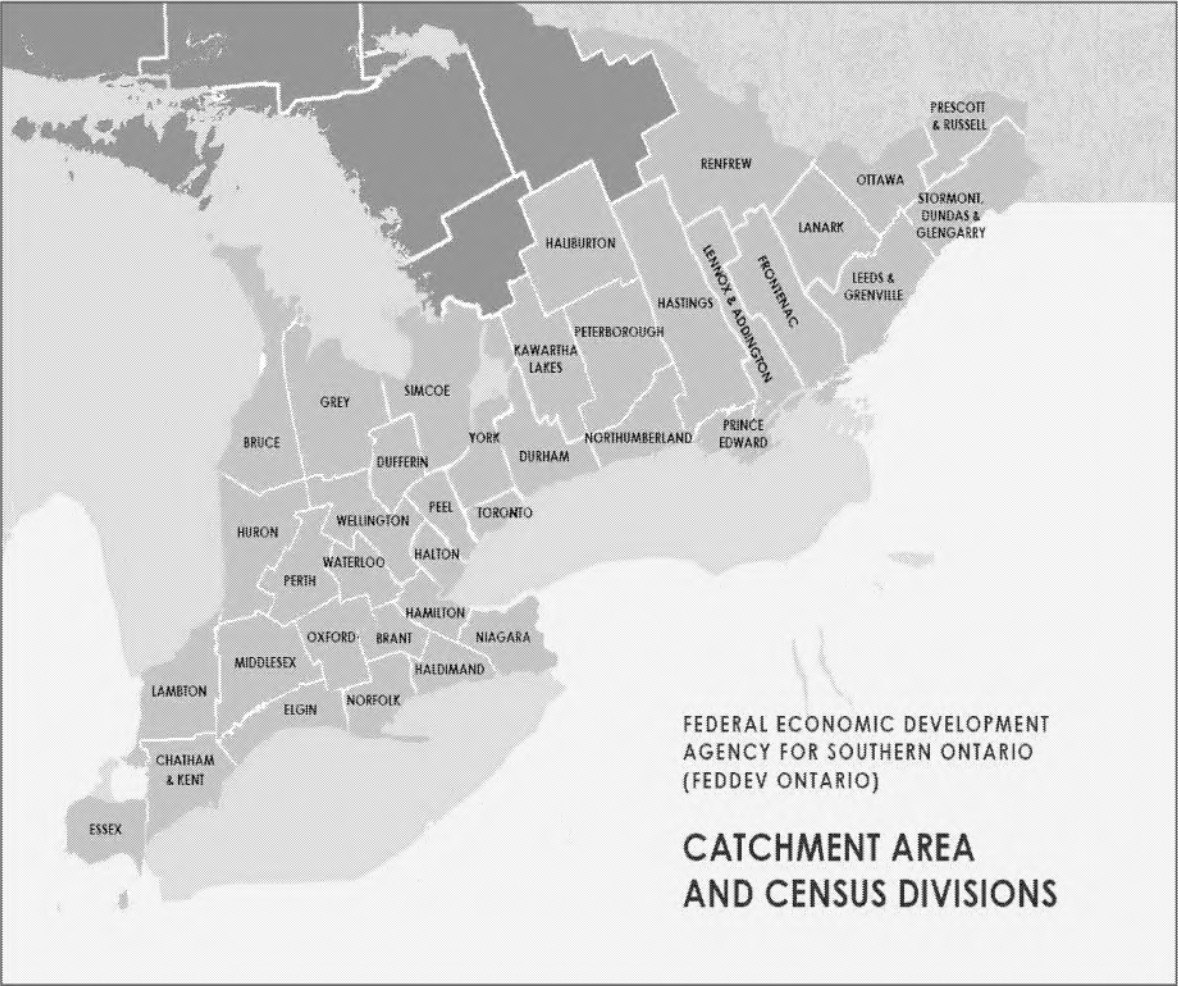


Federal Economic Development Agency for Southern Ontario (FedDev Ontario)

Towards a stronger southern Ontario
Enabling tomorrow's economy, today



FEDERAL ECONOMIC DEVELOPMENT AGENCY FOR SOUTHERN ONTARIO



MANDATE

FedDev Ontario’s mandate is to strengthen southern Ontario’s capacity for innovation, economic development, and growth.

The Agency’s aims are to achieve the following Departmental Results:

- Communities in southern Ontario are economically diversified;
- Businesses in Ontario invest in the development and commercialization of innovative technologies; and
- Businesses in southern Ontario are innovative and growing.



ROLES AND RESPONSIBILITIES

*Making **strategic investments to support the government's economic growth priorities** through three ongoing regionally tailored programs:*

- Business Scale-up and Productivity – accelerates the growth of firms by supporting the adoption of new, innovative technologies
- Regional Innovation Ecosystem – develops strong and inclusive regional projects that support business growth and innovation
- Community Economic Development and Diversification – helps small and rural communities participate in economic growth opportunities

*Delivering **national ongoing programs** in southern Ontario:*

- Community Futures Program – provides funding to southern Ontario's Community Futures Development Corporations to support rural businesses and communities
- Economic Development Initiative – supports organizations that promote economic growth in the region's Official Language Minority Communities



ROLES AND RESPONSIBILITIES (CONT'D)

*Delivering **targeted, time-limited programs in response to government priorities and the broader economic environment**, supporting:*

- COVID-19 Relief – Regional Relief and Recovery Fund, Regional Air Transportation Initiative
- COVID-19 Recovery – Jobs and Growth Fund, Aerospace Regional Recovery Initiative, Canada Community Revitalization Fund, Tourism Relief Fund, Major Festivals and Events Support Initiative
- Diversity and Inclusion – Women Entrepreneurship Strategy Ecosystem Fund, Black Entrepreneurship Strategy Ecosystem Fund

*FedDev Ontario also **supports economic growth priorities in the southern Ontario agenda** by:*

- Providing services to businesses and stakeholders
- Convening key stakeholders to build collaborations and explore solutions to grow the region's economy
- Promoting southern Ontario's assets and advocating for the region's interests within government to fulfill priorities in the region
- Helping businesses and organizations find the best support for their needs by working closely with key federal and provincial partners



PRAIRIES ECONOMIC DEVELOPMENT CANADA (PRAIRIESCAN)

Mandate

PrairiesCan is proud to support the economies of the Prairie provinces and advance the region’s interests in Ottawa. PrairiesCan works as a convenor, pathfinder, advisor, investor, and collaborator by delivering on national and regional economic development programs, including investing in regional innovation ecosystems and supporting business scale up through repayable and non-repayable contribution programs. It also supports community economic development for entrepreneurs and groups with lower economic participation rates, and delivers national programs in the Prairies.



Dylan Jones
Interim President
Regions: AB, SK, MB

Budget: \$236M
+ \$336M time-limited G&C*
FTEs: 375
Headquarters: Edmonton, AB
**Amount reflects budget for
both PrairiesCan and PacifiCan*

Governance

The President is appointed by the Governor in Council and is responsible for the administration of the Agency’s operations and its employees.



Prairies Economic Development Canada (PrairiesCan)



MANDATE

- On August 6, 2021, PrairiesCan was created when Western Economic Diversification Canada (WD) was split into two separate agencies to enhance federal economic development presence and services in the west.
- PrairiesCan's mandate is to support the economic growth and diversification in the Prairie provinces and advance the interests of the region in national economic policy, programs, and projects.

With 375 employees, PrairiesCan serves:

- More than 6.9 million people
- More than 260,000 small and medium-sized enterprises

Responsible for a region:

- Nearly 1.8 million km²
- Produces \$510B in economic output

PRAIRIES ECONOMIC DEVELOPMENT CANADA



A BRIGHT FUTURE

- PrairiesCan is headquartered in Edmonton, AB, with three additional offices in the Prairies and one in Ottawa. Seven new points of service across the Prairies have been announced and are planned to launch in the coming months.
- When complete, this enhanced on-the-ground presence will bring the federal government closer to Prairie businesses and the communities they call home, improve service accessibility, and offer new opportunities for collaboration.
- PrairiesCan is building on WD's long history of supporting economic development across Western Canada.
 - Since 2011, WD supported over 840 communities and helped to create or maintain over 86,000 jobs.
 - Since 2014, WD clients have generated over \$3.2B in export sales growth.



ROLES AND RESPONSIBILITIES

PrairiesCan is proud to support the economies of the Prairie provinces and advance the region’s interests in Ottawa. The Agency does so through five main roles:

Convenor

Connecting key regional economic actors with federal departments and other partners

Pathfinder

Helping industry, post-secondary institutions, Indigenous groups, and others navigate the federal government ecosystem

Advisor

Intelligence gatherer using place-based research and knowledge to advocate for regional interests in national policy discussions

Investor

Targeted funding to businesses and not-for-profit organizations to spur diversification, innovation, and community economic growth

Collaborator

Through partnerships, advancing national priorities and responding to regional economic dynamics



PACIFIC ECONOMIC DEVELOPMENT AGENCY OF CANADA (PACIFICAN)

Mandate

PacifiCan was established in August 2021 to develop the British Columbian economy and advance its interests in Ottawa. PacifiCan supports the Government’s economic priorities to assist innovative businesses, communities, and non-profits supporting entrepreneurs and plays roles as a convenor, collaborator, investor, advisor, and pathfinder. PacifiCan includes nine points of service announced in communities across British Columbia to enhance federal presence and improve economic outcomes.



Dylan Jones
President

Budget: \$108.6M
+ \$336.9M time-limited G&C*
FTEs: 117
Headquarters: Surrey, BC
**Amount reflects budget for
both PrairiesCan and PacifiCan*

Governance

The President is appointed by the Governor in Council and is responsible for the administration of the Agency’s operations and its employees.



PacifiCan

**A new Federal Economic Development
Agency just for British Columbia**





MANDATE

- Established August 2021 to develop the BC economy and advance its interests in Ottawa
- Core budget of \$108.6M in FY2021–2022

SUPPORTING THE GOVERNMENT'S ECONOMIC PRIORITIES:

- Creating quality job opportunities and resilient BC communities
- Promoting the growth of BC's small and medium-sized businesses and priority sectors
- Developing ecosystems and non-profit organizations that support entrepreneurs and innovation

1700 businesses and 400 communities and non-profits supported since 2015*

**As BC Region of Western Economic Diversification*



New Service Delivery Model

New Points of Service

Invest

Investing in opportunities for jobs, competitiveness, growth, and unique government objectives



Advise

Deploying regional insights and local perspectives to inform national economic decision-making

Pathfind

Helping businesses, innovators, and communities navigate federal economic policies and programs



Convene

Bringing stakeholders together to develop and advance priority sectors and initiatives



Improving economic development outcomes for British Columbians and Canadians



CANADIAN NORTHERN ECONOMIC DEVELOPMENT AGENCY (CANNOR)

Mandate

CanNor works in collaboration with Northerners and Indigenous peoples, communities, businesses, organizations, other federal departments, and other orders of government to help build diversified and dynamic economies that foster long-term sustainability and economic prosperity in Nunavut, the Northwest Territories, and Yukon. In addition to delivering economic development programs, CanNor delivers services that are specific to the territories, such as the Northern Projects Management Office (NPMO), to improve the efficiency of the territorial environmental review processes through the coordination of federal participation and Pilimmaksaivik to coordinate a federal government-wide approach to building a representative (85% Inuit) public service in Nunavut. CanNor also coordinates the Northern Federal Council, a collaborative network of senior federal officials responsible for implementing Government of Canada programs and services within the territories.



Paula Isaak
President

2021–2022 Budget: \$104.6M*
FTEs: 120

Headquarters: Iqaluit, NU

**Includes Budget 2021
investments*

Governance

The President is appointed by the Governor in Council and is responsible for the administration of the Agency's operations and its employees. In addition to (and separately from) her role as President of CanNor, Paula serves as Associate Deputy Minister of Crown-Indigenous Relations and Northern Affairs Canada.



Canadian Northern Economic Development Agency (CanNor)





CANADIAN NORTHERN ECONOMIC DEVELOPMENT AGENCY



MANDATE

CanNor fosters economic development in Canada's territories by:

- delivering a suite of **economic development programs**, including Indigenous-specific programs
- building **partnerships** that leverage investments
- funding **skills development** opportunities
- coordinating federal participation in territorial **environmental review processes**
- maintaining a **Crown consultation record** for major projects
- coordinating a federal government-wide approach to building a representative (85% Inuit) public service in Nunavut
- **advocating** for the economic interests of Northerners and Indigenous peoples

ECONOMIC GROWTH STRATEGY

CanNor's objectives are guided by its economic growth strategy, which highlights four interrelated areas of action:

- **Skilled Workforce**
- **Infrastructure Investments and Development**
- **Resource Development**
- **Diversification and Innovation**



ROLES AND RESPONSIBILITIES

Grants and Contribution Programs

- CanNor-specific programs and national programs to support territorial businesses and communities and help stimulate the growth of Northern economies.

Northern Projects Management Office

- Established in 2010 to improve the efficiency of the federal environmental review processes for proposed resource development and infrastructure projects in the territories.

Pilimmaksaivik, The Federal Centre of Excellence for Inuit Employment in Nunavut

- Established in 2016, office responsible for coordinating a **federal** government-wide approach to building a representative (85% Inuit) public service in **Nunavut**.

Policy and Planning

- CanNor provides strategic and program policy advice with regard to economic development, diversification, and opportunities in the North. It also champions the economic interests of the North within and outside government.
- CanNor also coordinates the **Northern Federal Council**, a collaborative network of senior federal officials responsible for implementing Government of Canada programs and services within the territories.

A large, abstract graphic consisting of several thin black lines of varying lengths and orientations, creating a complex, overlapping geometric pattern in the upper left and center of the page.

ANNEX B: DEPARTMENTAL SERVICES AND SUPPORTS





DEPARTMENTAL SERVICES AND SUPPORTS

THE PORTFOLIO IS HERE TO SUPPORT YOU AND ENSURE A SUCCESSFUL AND SEAMLESS TRANSITION.

The Deputy Minister (DM) is your key interlocutor, providing non-partisan advice to help implement the Government's agenda. The DM is supported by an Associate Deputy Minister (ADM).

The Department will work closely with your office to provide support on a wide-range of policy, corporate, and operational issues, including:

- Providing briefings and responding to requests for information;
- Providing communications support;
- Coordinating support on Cabinet, parliamentary, Governor-in-Council, and ministerial appointments and correspondence; and
- Providing support on day-to-day operations and general administrative and budgetary information.



DEPARTMENTAL SERVICES AND SUPPORTS

While you and your staff are responsible for discussing possible conflicts of interest and disclosing them to the Conflict of Interest and Ethics Commissioner, the DM, supported by his Chief of Staff and the Corporate Secretary, is responsible for putting measures in place to ensure appropriate delegations of authority and to prevent potential or perceived conflicts of interest that could arise in the execution of your mandate.

Corporate services and support will be provided to you in your capacity as Minister of Tourism.



DEPARTMENTAL CONTACT FOR MINISTER'S OFFICE

The Departmental Liaison is the primary contact between your office and the Department and provides integrated and coordinated timely advice on behalf of the Department and in response to requests from your office, including:

- Coordinating requests for information, briefing materials, and staff briefings;
- Tracking briefing notes and Cabinet documents entering your office; and
- Managing documents requiring your signature, including the distribution and processing of decision dockets and ministerial correspondence.

DAY TO DAY OPERATIONS AND ADMINISTRATIVE ISSUES

The Departmental Liaison will also assist your office with day-to-day office requirements and liaise with the Office of the Corporate Secretary on administrative issues (i.e., finance and human resources, facilities and assets, IT and information management).

DEPARTMENTAL LIAISON

Matthaeus Lundie (Tourism)

matthaeus.lundie@ised-isde.gc.ca

Cell: [REDACTED]



LIAISON BETWEEN DMs AND MINISTER'S OFFICE

The DM's Chief of Staff acts as a liaison between DMs and your office, working closely with your Chief of Staff and the Department, ensuring ongoing communications and oversight of key files.

DM OFFICE OPERATIONS

The Chief of Staff manages the operations of the DM's Office, including the requesting, tracking, and distributing of materials for information, discussion, and approval to you and your office.

CHIEF OF STAFF, DEPUTY MINISTER'S OFFICE

Anne-Marie Monteith

anne-marie.monteith@ised-isde.gc.ca

Cell: [REDACTED]

Office: 343-291-2830



MAIN CONTACT FOR MINISTER'S CHIEF OF STAFF ON CORPORATE SERVICES

The Corporate Secretary is the main point of contact for your Chief of Staff on budget and human resources, and provides a range of corporate services and supports to assist you and your office in delivering on your mandate.

CABINET AFFAIRS

Coordinates the delivery of Memoranda to Cabinet, briefing materials, and other supports for Cabinet duties; and tracks Cabinet committee agendas and progress on Cabinet matters related to the ISED portfolio.

APPOINTMENTS

Provides advice and support on all Governor in Council and ministerial appointments within the ISED Portfolio, in coordination with the Privy Council Office and ISED Portfolio organizations as required.

PARLIAMENTARY AFFAIRS

Coordinates committee appearances, parliamentary returns, late shows and Opposition Day speeches, and the tabling of reports from the Department and Portfolio; provides advice on the drafting of Parliamentary Strategies for Memoranda to Cabinet; provides support for legislation and legislative processes; and provides general information on matters related to Parliament. Note that Question Period is supported by the Strategic Communications and Marketing Sector.

EXECUTIVE CORRESPONDENCE

Manages and tracks incoming and outgoing ministerial correspondence relevant to the Minister's mandate, including invitations and meeting requests; coordinates proposed draft responses for ministerial review and signature; and provides professional editing services for ministerial correspondence and documents as required.

CORPORATE SECRETARY

Ana Maia

ana.maia@ised-isde.gc.ca

Cell: [REDACTED]

Office: 343-291-2811



ACCESS TO INFORMATION AND PRIVACY (ATIP)

The Office of the Corporate Secretary processes requests and proactive disclosure requirements for the Department, administers the Privacy Impact Assessment Policy, provides training and advice to the Department, and provides notifications of impending requests and proactive disclosures and related sensitivities.

- The ***Access to Information Act*** gives every Canadian citizen, permanent resident, individual, or corporation in Canada the right to request access to records that are under the control of federal government institutions, regardless of their format.
- Now that you are working alongside a federal department, this means that the information you share and receive with officials in the Department is subject to this act.
- **Proactive Publication:**
 - The *Access to Information Act* calls for the proactive disclosure of certain documents, including your mandate letter; the briefing binder prepared for ministerial transition; the list of briefing notes sent to your office; Question Period notes that were prepared and used; and ministerial briefing materials prepared for parliamentary committee appearances.
 - The following items are also subject to proactive publication: departmental contracts, grants, and contributions over \$25K; Portfolio reports tabled in Parliament; departmental and ministerial travel and hospitality expenses; Minister's office annual expenses; reclassifications of positions within the public service within the Department; and a list of completed ATIP requests. Deadlines for publication vary from 30 to 120 days.



DEPARTMENTAL SERVICES AND SUPPORTS: KEY CONTACTS

Title	Name	Contact Information
Deputy Minister Innovation, Science and Economic Development Canada	Simon Kennedy	simon.kennedy@ised-isde.gc.ca Cell: [REDACTED] Office: 343-291-2888
Associate Deputy Minister	Paul Thompson	paul.thompson@ised-isde.gc.ca Cell: [REDACTED] Office: 343-291-2051
Chief of Staff to the Deputy Minister	Anne-Marie Monteith	anne-marie.monteith@ised-isde.gc.ca Cell: [REDACTED] Office: 343-291-2830
Corporate Secretary	Ana Maia	ana.maia@ised-isde.gc.ca Cell: [REDACTED] Office: 343-291-2811
Director, Departmental Liaison (Tourism)	Matthaeus Lundie	matthaeus.lundie@ised-isde.gc.ca Cell: [REDACTED]
Communications		
Assistant Deputy Minister Strategic Communications and Marketing Sector	Vicky Eatrides	vicky.eatrides@ised-isde.gc.ca Cell: [REDACTED] Office: 343-291-1652



ANNEX C: LIST OF COMMONLY USED ACRONYMS





This annex provides a summary of commonly used acronyms.
For a full list of ISED and Portfolio-related acronyms, please visit:
[Acronyms and Abbreviations \(ic.gc.ca\)](https://ic.gc.ca).

Acronyms (A-B)

ACRONYM	DEFINITION
A	
A /	Acting (before position title)
ACCA	Accelerated capital cost allowance
ACCRU	Alliance of Canadian Comprehensive Research Universities
AGS	Accelerated Growth Service; Atlantic Growth Strategy
AI	Artificial intelligence
ALLS	Advanced Laser Light Source
AMR	Anti-microbial resistance
APEC	Asia-Pacific Economic Cooperation
ASEAN	Association of Southeast Asian Nations

ACRONYM	DEFINITION
ATSSC	Administrative Tribunals Support Service of Canada
AURP	Association of University Research Parks
B	
BAI	Business accelerators and incubators
BCAP	Business Credit Availability Program
BDP	Business Development Program
BEP	Black Entrepreneurship Program
BERD	Business Expenditure on Research and Development
BIAP	Business Innovation Access Program



Acronyms (C)

ACRONYM	DEFINITION
C	
C150	Canada 150 Research Chairs
CANARIE	Canada's Advanced Research and Innovation Network
CARA	Canadian Association of Research Administrators
CATA	Canadian Advanced Technology Alliance
CARIC	Consortium for Aerospace Research and Innovation Canada
CAUBO	Canadian Association of University Business Officers
CBDC	Community Business Development Corporation
CC	Compute Canada
CCA	Council of Canadian Academies
CCI	College and Community Innovation Program
CCSIF	Community and College Social Innovation Fund
CDAP	Canada's Digital Adoption Program
CEBA	Canada Emergency Response Benefit
CERC	Canada Excellence Research Chairs
CERN	European Organization for Nuclear Research
CETA	Comprehensive Economic Trade Agreement (Canada-EU)
CEWS	Canada Emergency Wage Subsidy

ACRONYM	DEFINITION
CFI	Canada Foundation for Innovation
CFREF	Canada First Research Excellence Fund
CGH	Clean Growth Hub
CGS	Canada Graduate Scholarships
CHARS	Canadian Higher Arctic Research Station
CICan	Colleges and Institutes Canada (formerly Association of Community Colleges of Canada)
CIFAR	Canadian Institute for Advanced Research
CITT	Canadian International Trade Tribunal
CLS	Canadian Light Source
CRC	Canada Research Chair or Communications Research Centre Canada
CRCC	Canada Research Coordinating Committee
CSA	Canadian Space Agency
CSAC	Canadian Statistics Advisory Council
CSBFP	Canada Small Business Financing Program
CSI	Council on Science and Innovation
CSPC	Canadian Science Policy Centre
CUSMA	Canada-U.S.-Mexico Agreement
CVCA	Canada's Venture Capital & Private Equity Association



Acronyms (D-H)

ACRONYM	DEFINITION
D	
DOE	US Department of Energy
DRI	Digital Research Infrastructure
E	
EDI	Equity, diversity and inclusion
EUREKA	International network for market-driven industrial research
EV	Electric vehicle
F	
FSR	Fundamental Science Review
G	
GBA+	Gender-Based Analysis Plus
GC	Genome Canada

ACRONYM	DEFINITION
G	
Gs&Cs	Grants and Contributions
GDP	Gross domestic product
GDPR	EU General Data Protection Regulation
GERD	Gross domestic expenditure on research and development
GPAI	Global Partnership on Artificial Intelligence
GRDI	Genomics Research and Development Initiative
GRI	Global Research Infrastructure
H	
HASCAP	Highly Affected Sectors Credit Availability Program
HERD	Higher education expenditure on research and development
HPC	High performance computing
HQP	Highly qualified personnel



Acronyms (I-M)

ACRONYM	DEFINITION
I	
I2I	Idea to Innovation (NSERC Program)
ICA	<i>Investment Canada Act</i>
ICT	Information and communication technologies
IDEaS	Innovation for Defence Excellence and Security
IDRC	International Development Research Centre
ILO	University or college Industry Liaison Office
IP	Intellectual property
IQC	Institute for Quantum Computing – at the University of Waterloo
IRAP	Industrial Research Assistance Program (NRC program)
ISC	Innovative Solutions Canada
ISI	Innovative Superclusters Initiative
ITA	Industrial Technology Advisor
ITB	Industrial and Technological Benefits
ITO	Industrial Technologies Office

ACRONYM	DEFINITION
L	
LEEFF	Large Employer Emergency Financing Facility
LEO	Low Earth Orbit
LGBTQ2	Lesbian, gay, bisexual, transgender, queer and two-spirit
LHC	Large Hadron Collider – experiment at CERN
LTS	Let’s Talk Science
M	
M&A	Mergers and Acquisitions
MC	Memorandum to Cabinet
M&E	Machinery and Equipment
MNE	Multinational enterprise
MPMO	Major Projects Management Office
MR	Ministerial Recommendation
MRF	Major Research Facility
MSI	Major Science Initiative



ACRONYMS (N-P)

ACRONYM	DEFINITION
N	
NAICS	North American Industry Classification System
NCE	Networks of Centres of Excellence (Tri-Council program)
NFP	Not-for-profit
NINT	National Institute for Nanotechnology (NRC / University of Alberta lab)
NPMO	Northern Projects Management Office
NREN	National Research and Education Network
NZA	Net-Zero Accelerator (part of Strategic Innovation Fund)
O	
OCUR	Ontario Council on University Research
OECD	Organisation of Economic Development and Cooperation
ONC	Ocean Networks Canada
OTN	Ocean Tracking Network

ACRONYM	DEFINITION
P	
PAGSE	Partnership Group for Science and Engineering
PCF	Pan-Canadian Framework on Clean Growth and Climate Change
PDF	Postdoctoral Fellowship
PET	Pierre Elliott Trudeau Foundation
PGS	Postgraduate Scholarship
PI	Perimeter Institute for Theoretical Physics
PNP	Private non-profit
PSISIF	Post-Secondary Institutions Strategic Investment Fund



Acronyms (R-S)

ACRONYM	DEFINITION
R	
R&D	Research and Development
RD&D	Research, Development and Demonstration
RDA	Regional Development Agency
RDC	Research Data Canada
RDM	Research Data Management
REGI	Regional Economic Growth through Innovation Initiative
RFFF	Regional Relief and Recovery Fund
RSAs	Related scientific activities
RSF	Research Support Fund (formerly Indirect Costs Program ICP)
R&T	Research and Technology
Rx&D	Canada’s Research-Based Pharmaceutical Companies
S	
SBDA	Science-based departments and agencies (Federal organizations performing research)
SBED	Small Business and Entrepreneurship Development

ACRONYM	DEFINITION
SDTC	Sustainable Development Technology Canada (Federally supported organization)
SIF	Strategic Innovation Fund
SME	Small and medium-size enterprise
SOE	State-owned enterprise
SPOR	Strategy for Patient-Oriented Research (CIHR)
SR&ED	Scientific Research and Experimental Development (Federal tax credit)
SSF	Strategic Science Fund
STEAM	Science, Technology, Engineering, Arts and Mathematics
STEM	Science, Technology, Engineering and Mathematics
ST&I	Science, Technology and Innovation
S&T	Science and Technology



Acronyms (T-W)

ACRONYM	DEFINITION
T	
TAC	Technology Access Centre Grant (NSERC College and Community Innovation Program)
TB Sub	Treasury Board Submission
Ts&Cs	Terms and Conditions
Tri-Council	The three federal granting councils: NSERC, SSHRC and CIHR
TRIUMF	Canada's particle accelerator centre
TRL	Technology Readiness Level (nine levels)
TTO	Technology Transfer Office
U	
UBF	Universal Broadband Fund
UCASS	University and College Academic Staff System
USRA	Undergraduate Student Research Award

ACRONYM	DEFINITION
V	
VC	Venture Capital
VCAP	Venture Capital Action Plan
VCCI	Venture Capital Catalyst Initiative
VP	Value Proposition
W	
WES	Women Entrepreneurship Strategy
WEF	World Economic Forum
WIL	Work-integrated learning
WIPO	World Intellectual Property Organization
WTO	World Trade Organization



Acronyms (Select Government Departments and Agencies)

ACRONYM	DEFINITION
AAFC	Agriculture and Agri-Food Canada
ACOA	Atlantic Canada Opportunities Agency
BDC	Business Development Bank of Canada
CanNor	Canadian Northern Economic Development Agency
CED	Canada Economic Development for Quebec Regions
CIHR	Canadian Institutes of Health Research
CIRNA	Crown-Indigenous Relations and Northern Affairs
CRTC	Canadian Radio television and Telecommunications Commission
CSA	Canadian Space Agency
DFO	Fisheries and Oceans Canada
DND	National Defence
ECCC	Environment and Climate Change Canada
EDC	Export Development Bank of Canada
ESDC	Employment and Social Development Canada
FIN	Finance Canada
FedDev Ontario	Federal Economic Development Agency for Southern Ontario
FedNor	Federal Economic Development Agency for Northern Ontario
GAC	Global Affairs Canada
HC	Health Canada

ACRONYM	DEFINITION
IRCC	Immigration, Refugees and Citizenship Canada
ISED	Innovation, Science and Economic Development Canada
ISC	Indigenous Services Canada
NRC	National Research Council
NRCan	Natural Resources Canada
NSERC	Natural Sciences and Engineering Research Council
PacifiCan	Pacific Economic Development Canada
PCH	Canadian Heritage
PCO	Privy Council Office
PHAC	Public Health Agency of Canada
PrairiesCan	Prairies Economic Development Canada
PS	Public Safety Canada
PSPC	Public Services and Procurement Canada
SSHRC	Social Sciences and Humanities Research Council
SSC	Shared Services Canada
StatCan	Statistics Canada
TBS	Treasury Board Secretariat
TC	Transport Canada