

REGION OF OTTAWA-CARLETON  
RÉGION D'OTTAWA-CARLETON

REPORT  
RAPPORT

Our File/N/Réf.                    07-99-0065  
Your File/V/Réf.

DATE                                14 June 2000

TO/DEST.                         Corporate Services and Economic Development Committee

FROM/EXP.                        Executive Director, Economic Affairs

SUBJECT/OBJET                 **ECONOMIC GENERATORS**

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**DEPARTMENTAL RECOMMENDATIONS**

**That the Corporate Services and Economic Development Committee recommend Council:**

- 1.     Receive the executive summary of Choosing a Future: A New Economic Vision for Ottawa as the key element of a strategic economic development plan for the Ottawa region.**
- 2.     Support the proposed focus for the Ottawa Economic Development Corporation, Ottawa Tourism and Convention Authority, Ottawa Life Sciences Council, and the Ottawa Centre for Research and Innovation, as detailed in this report, and encourage the boards of these organizations to pursue these proposals.**
- 3.     Approve the expenditure of \$400,000 to support the implementation of the plan, with the details on the allocation of these funds delegated to The Ottawa Partnership, through the administration of the Economic Affairs Office.**

**BACKGROUND**

In March 1999 Regional Council directed The Ottawa Partnership (TOP), a newly formed body overseeing economic development efforts in the Ottawa region, to prepare a Strategic Economic Development Plan. In June 1999 Council approved the expenditure of \$300,000 on this plan. A further \$100,000 was received from the Ontario Ministry of Economic Development and Trade. Council also delegated to TOP the final approval of the terms of reference and selection of consultant.

TOP, in defining the scope of the project, chose to focus specifically on the industries that export goods or services outside the region. This approach was taken as it was recognized that a healthy export sector is the most critical part of the economy, as it drives the entire rest of the economy and creates

many other jobs in service and other industries. The name Economic Generators Initiative was selected to emphasize this focus.

In Sept 1999 staff reported to Council the selection by TOP of ICF Consulting of San Rafael, California, to undertake the project. ICF was assisted by two local firms, FoTenn Consultants and WEFA. The project team spent the fall of 1999 analyzing the state of the economy and mobilizing stakeholders for participation.

On 28 January 2000 a public event was held, attended by over 400 people, where early findings of the project were presented. Included were the identification of seven distinct clusters of industries where the Ottawa region had a clear competitive advantage. These clusters included:

- Microelectronics
- Telecommunications Equipment
- Software and Communications Services
- Photonics
- Tourism
- Professional Services
- Life Sciences

At that time two backgrounders were distributed, the first explaining the purpose of the project and the “cluster” approach to economic development. The second backgrounder contained an overview of the Ottawa Economy, and discussed the state of the seven clusters. Both these backgrounders were distributed to Council.

## DISCUSSION

Since the last communication with Council, the project convened almost three hundred private and public sector leaders involved in the local economy, at a series of meetings during February, March and April of this year. Each cluster had its own set of meetings, where obstacles to economic growth, together with opportunities presented by Ottawa’s unique strengths, were identified and specific action initiatives developed to deal with them. In addition, several meetings were held with economic “foundation” institutions (financial community, workforce and education providers, and others) to develop means of responding to the needs of industry as discussed during the cluster meetings.

Following the meetings the project team distilled the initiatives into 33 distinct cluster initiatives, along with nine “flagship” initiatives (flagships are actions that cross over several or all clusters). These initiatives were unveiled to the community on 30 May 2000, at a major event attended by over 500 people. The consensus reaction to the plan was extremely positive, with numerous participants expressing enthusiasm over the momentum developed by the project.

A copy of the executive summary of the project is attached as Annex “A”. A full copy of the report is expected to be available in a few weeks.

## NEXT STEPS

With the Economic Generators Project having produced the key elements of an overall strategic economic development plan for the Ottawa region, the next step is now to implement the action initiatives the project proposes. Throughout the work over the past number of months, it has been emphasized that the delivery of the report documenting the development of an economic plan is in many ways the beginning, not the end of the overall process of reinvigorating and aligning the stakeholders involved in the Ottawa economy. The next step – implementation – is critical.

Implementation will occur through a combination of funding and participation from both the public and private sectors. TOP is well-positioned to lead the implementation and have proposed that the contract with ICF be extended in order to ensure a smooth transition into this phase. ICF have developed credibility with the business community and their presence will enhance the potential for successful implementation.

Staff propose that funding be directed to provide seed funding for certain high-priority initiatives, and to fund the extension of the contract with ICF. Staff also propose that TOP be delegated with the responsibility to approve the scope of the assignment with ICF, and to make decisions on the allocation of funds to specific initiatives. It is expected that slightly less than half the requested \$400,000 would be allocated to the ICF contract extension. The administration of these funds will remain with the Economic Affairs Office. This seed funding is intended to attract provincial, federal and private sector funding for specific projects, as appropriate.

One of the tasks assigned to ICF was to examine and recommend adjustments to the four external economic development agencies (Ottawa Economic Development, Ottawa Centre for Research and Innovation, Ottawa Tourism and Convention Authority, and the Ottawa Life Sciences Council). Attached as Annex “B” are the proposed new directions as developed by the consultant and endorsed by TOP. These have been discussed with the chairs of each organization, who have indicated a commitment to bring these to their full boards for further development, following which TOP will review and provide final endorsement.

The intention is that TOP will review the workplans submitted by each of the agencies, discuss financing levels for the next year’s budget, and submit their recommendations to the Ottawa Transition Board and the new city council when it is formed.

## CONSULTATION

The Economic Generators Project involved direct participation by about 300 stakeholders in the Ottawa region economy, with several hundred more monitoring progress. Two major public events were held during the project, where interim and final results were presented to a total of about 1000 people from the community.

The need to continue to ensure the initiatives developed during the project move quickly to implementation was discussed in all cluster working groups and has received their support.

EXPENDITURE JUSTIFICATION

The funds will enable the initiative developed during the Economic Generators Project to be implemented in a timely manner and continue the momentum developed during the process.

FINANCIAL STATEMENT

Funds are available in the 2000 Capital Budget, Order No. 900003, Economic Affairs, (Reference page 56).

*Approved by  
Réjean Chartrand*

RGM/

# About the Ottawa Partnership and the Economic Generators Initiative

*The Ottawa Partnership (TOP)* is a group of private and public leaders who are committed to advancing the local economy. TOP emerged in 1999 from an agreement between Ottawa's economic agencies on the need for a board to ensure co-ordination and alignment of activities. Its mandate is to provide leadership and advice, at a strategic level, on action required to improve and grow Ottawa's economy.

Staff support to TOP is provided by the Economic Affairs Office of the Region of Ottawa Carleton.

TOP has set as its first priority the preparation of a strategic plan for development of the engines that fuel our economy – the clusters of industries, their primary suppliers and supporting institutions, that together export goods and services and bring new money into the community. These clusters drive most of the overall growth of our economy, and their success is key to improving the standard of living for all our citizens. The project which is delivering this plan is the Economic Generators Initiative.

# The Ottawa Partnership

## **Co-Chairs**

ROD BRYDEN\*\*  
Chairman  
SC Stormont Corporation  
(Member at Large)

BOB CHIARELLI  
Chair  
Region of Ottawa-Carleton

## **Members**

KIRK MANDY\*  
President and CEO  
Mitel Corporation  
(Member at Large)

DIANE DESAULNIERS  
Groupe Vision Management Consulting  
(Member at Large)

GILLES PATRY\*  
Vice Rector Research  
University of Ottawa  
(representing Ottawa's  
post-secondary institutions)

BOB GILLETT  
President  
Algonquin College  
(representing Ottawa Centre for Research and  
Innovation)

OTTO HEBERLEIN  
General Manager  
Sheraton Hotel  
(representing Ottawa Tourism and Convention  
Authority)

ADAM CHOWANIEC  
President and CEO  
Tundra Semiconductor  
(representing Ottawa Economic Development)

PETER MORAND\*  
President  
Peter Morand and Associates  
(representing Ottawa Life Sciences Council)

JIM ORBAN\*  
Vice President Sales and Marketing and  
Assistant to the Publisher  
Ottawa Citizen  
(representing Ottawa Board of Trade)

DAN BEAMISH  
Councillor  
Region of Ottawa-Carleton

JEAN-MARC TROTTIER  
General Manager Passenger Sales  
Air Canada  
(representing Regroupement des gens  
d'affaires)

IAN BROMLEY\*  
Acting Director Economic Strategy Branch  
Ministry of Economic Development and Trade

## **Project Management for the Ottawa Economic Generators Initiative**

Region of Ottawa-Carleton  
Economic Affairs Office  
Réjean Chartrand, Project Director  
Robert McCallum, Project Manager

## **Project Consulting Team**

ICF Consulting  
Economic Strategy Group  
San Rafael, California

FoTenn Consultants  
Ottawa, Ontario

WEFA Canada  
Ottawa, Ontario

\* – Steering Committee Member

\*\* – Steering Committee Chair

# CHOOSING A FUTURE:

## *A New Economic Vision for Ottawa*

At the outset of the 21<sup>st</sup> century, Ottawa has a remarkable opportunity to lead the rest of Canada into a prosperous, self-fuelling new economy based on investment, entrepreneurship and innovation. Ottawa can choose its economic future by leveraging private sector initiative, using public policy in creative ways, and building new partnerships involving private firms, government, and educational institutions.

How can this be achieved? By articulating a compelling economic vision, mobilizing resources toward that end, and working across the community to build the partnerships and foundations within Ottawa that will generate a new kind of economy.

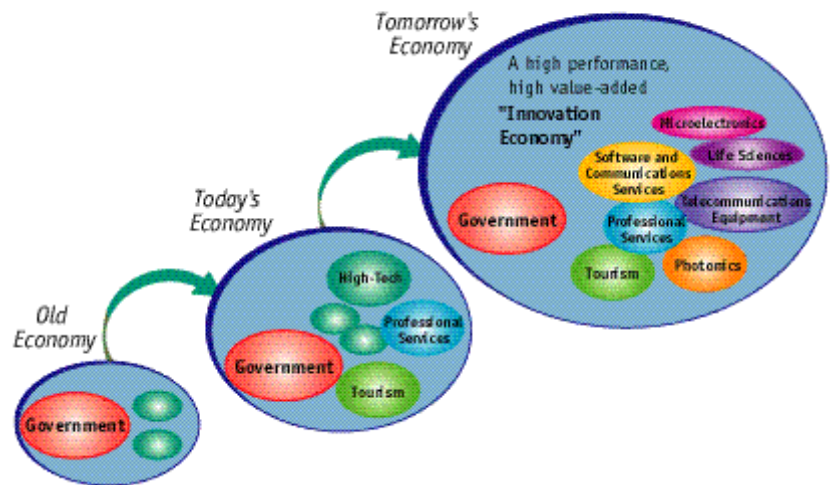
Ottawa today enjoys a high-performance economy, endowed with firms producing products and services in demand globally. However, economic conditions in our rapidly changing world cannot be taken for granted – strategic planning is vital to ensure that the economy can adapt to whatever the future may hold. This report outlines an approach to growing our economy focused on Ottawa's Economic Generators – the industries that export products and services, and bring new money into the economy.

Achieving a competitive economy requires that leaders articulate a new economic vision – one that builds on today's economic advantages, but goes further. Ottawa has already completed one transition, from a government-dominated economy to one with a strong high-tech flavour. One more transition is now required – to an *Innovation Economy*.

An innovation economy in Ottawa will be characterized by:

- Competitive clusters of industries, with new clusters constantly emerging.
- Specialized economic foundations, increasingly responsive to the needs of firms.
- Growing levels of entrepreneurship within firms and public institutions.
- Creation of quality jobs for a wider spectrum of residents.

### A new Economic Vision for Ottawa



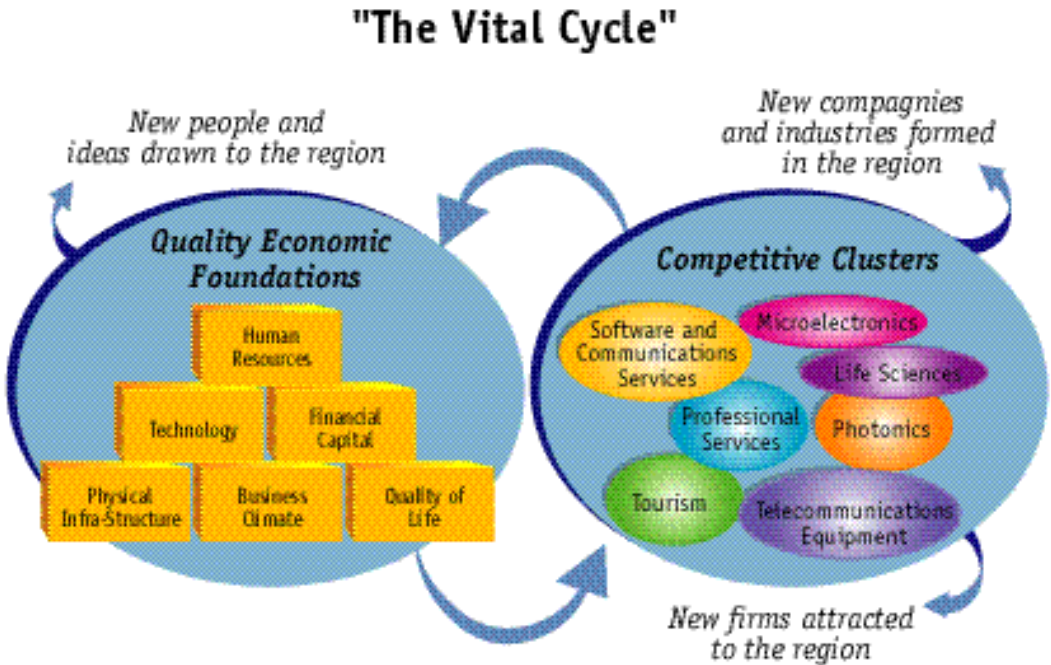


# A New Approach: Cluster-based Economic Development

Clusters are sets of competing and complementary industries and firms which are linked together by formal and informal relationships. Competitive economic clusters require specialized economic foundations – public and private institutions that provide the critical inputs needed by clusters. These foundations provide firms with:

- A skilled and adaptable workforce.
- Access to technology and technical know-how.
- Access to financial capital.
- An advanced physical infrastructure.
- A competitive business climate.
- High quality of life.

Around the world, those regions that are developing the most dynamic economies are doing so by shifting to a new approach to economic development, focused on cluster development. These regions focus their energy on creating “vital cycle” economies, where the foundations strengthen, and in turn are strengthened by, the cluster firms.







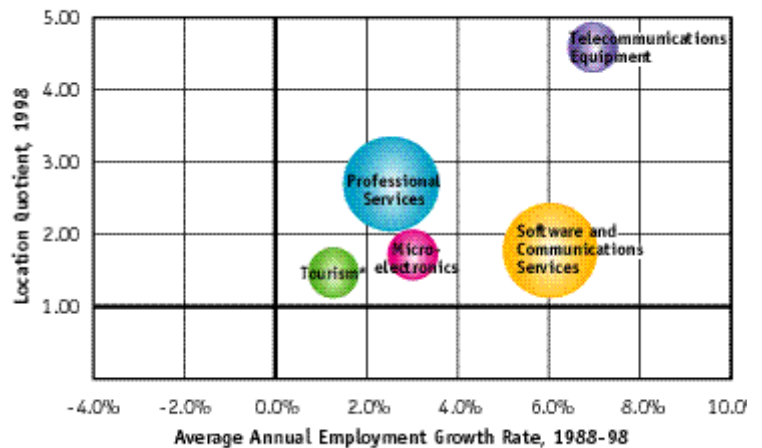
# Ottawa's Clusters

Analysis has shown that the Ottawa economy is comprised of seven distinct export-based clusters:

- Telecommunications Equipment
- Microelectronics
- Software and Communications Services
- Professional Services
- Tourism
- Life Sciences
- Photonics

These seven clusters include about a quarter of all private sector jobs in Ottawa, and together with federal government employment, drive the rest of the economy through the creation of spin-off jobs in many sectors.

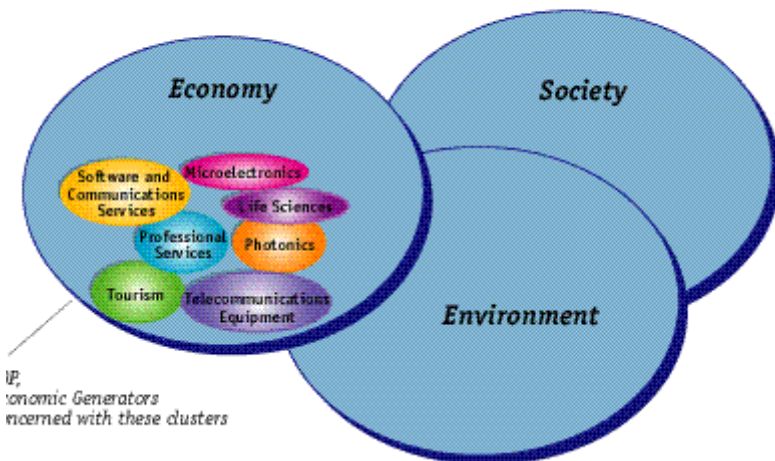
**Growth Share Matrix for Ottawa's Clusters**



\* Tourism cluster employment includes only amusement and recreation services.

Analysis shows that Ottawa's clusters are performing well in two dimensions. They are growing faster than both the Ottawa and North American economies overall, as well as seeing significantly higher employment concentration, or "location quotient", than the North American average. (Note that two clusters are not illustrated; Life Sciences and Photonics, due to lack of comparable data.)

## Three Policy Domains Key to Sustaining Growth and Development



IP, Economic Generators concerned with these clusters



# Challenges to Ottawa’s Economic Growth

Ottawa faces many of the challenges faced by other fast growing, technology intensive regions. Labour shortages are affecting every cluster – a problem that calls out for new thinking and new approaches to skill training in the very near term. Infrastructure constraints are being felt as well, including increasing traffic congestion and concerns around availability of office space and serviced industrial land, particularly in the core and west end. Labour and infrastructure shortages could soon become “economic showstoppers” unless there is near-term action.

# Strategies for Developing Ottawa’s Innovation Economy

## STRATEGY 1

### *Accelerated Cluster Development*

To create an Innovation Economy, leaders will need to focus on enhancing and continually improving the competitiveness of Ottawa’s seven clusters, and building up seed clusters. The cluster approach should become the dominant way to conduct economic development in Ottawa. This means encouraging the creation of cluster networks, like the new Ottawa Photonics Cluster. Existing organizations like the Ottawa Life Sciences Council and the Ottawa Tourism and Convention Authority will need to work with cluster leaders to shift their focus to greater cluster development. This will bring more dynamism into the economy and will spur the development of new industries and constantly “regenerate” the economy.

  
**STRATEGY****2*****Enhance Economic Foundations***

Building an Innovation Economy will require that clusters have access to the essential inputs for cluster competitiveness. For the public sector this means ensuring adequate funding for education, job training, and other workforce investment. It also means building new infrastructure in advance of growth. The private sector will have a critical role to play as well, providing financial capital – especially non-traditional early-stage financing, such as venture and “angel” financing, for start-up companies.

**STRATEGY****3*****Balance Economic Growth with Social Equity and Environmental Sensitivity***

Ottawa’s high quality of life is a key factor in the region’s economic success, helping to attract both tourists and talented people seeking desirable places to live, work and visit. Maintaining the attractiveness of Ottawa is critical to achieving its economic vision.

The question remains; can Ottawa expand its economy while maintaining its unique liveability? It can, if it respects the need to balance economic growth with social equity and environmental protection. Social equity is a particular concern in technology-intensive economies, where the benefits of economic growth may not be universally shared. Ensuring attention to the environment will also be important, especially in the face of pressures to open more land for growth. Leaders will need to be particularly vigilant in ensuring that land use policies do not create traffic congestion and other urban ills that damage the quality of life.



# Flagship Initiatives for Building an Innovation Economy

To achieve the vision and successfully implement the three-part strategy above, Ottawa's leaders will need to continue to do the things they have done well in the past – celebrate entrepreneurship, ensure that key institutions are able to produce the inputs needed for a competitive economy, and focus on a high quality of life. However, they will also need to do some things differently, and new things as well.

Nearly 300 business and government leaders have worked hard over the past few months to identify critical challenges to the economy, set priorities, and set the stage for new civic, flagship initiatives. These are big, strategic ideas, whose implementation will take time (perhaps years rather than months).

Nine Flagship Initiatives are proposed. These are not the only major projects on which Ottawa should focus over the next several years. They are, however, the ideas that emerged from this project, as well as from best practices around the world.

## ***Flagship Initiatives***

### ***“Ottawa Connects;” Build a 21<sup>st</sup> Century Telecommunications Infrastructure***

Build an advanced communications infrastructure that can keep Ottawa competitive and lay the foundation for propelling the economy forward. Significantly expand the broadband Ottawa Metropolitan Advanced Network (OMAN) concept to enable wide-ranging information sharing and advanced applications development – a bulwark for an “Innovation Economy.”

### ***“Technological Listening Posts;” Position R&D Institutions to Play a Key Role in Developing Ottawa’s Innovation Economy***


Build on the success achieved by the National Research Council, Communications Research Centre and other key R&D institutions in the region in spawning so many of today's leading companies. Position these institutions to enhanced roles as sources of commercializable technology. Encourage and support them as sources of global “technology intelligence” for diffusing new technology developments into the nation's technology clusters. Implement a “technology listening post” concept by linking institutions with advanced technology centres worldwide through strategic alliances, joint research efforts and other institutional mechanisms.

### ***“Brand Ottawa;” Raise the Region’s Visibility Worldwide***

Put Ottawa on the world map for its capabilities in technology excellence and as a primary tourist destination. Establish an overarching, globally recognized “Ottawa brand”. Create sub-brands for each cluster, conceptually linked to the parent brand. Promote the brand image widely, building into the strategy tactics for attracting firms, technology, capital, customers, visitors and talented people.

### ***“Global Learning Centre;” Establish Programs and Facilities to Position Ottawa as a Place of Learning for the World***

Capitalize on growing global demand for corporate training and learning, as well as for specialized education in traditional



institutions. Position Ottawa as a cutting-edge, innovative learning and training centre. Build on excellence of clusters, and leverage Ottawa's physical, academic, intellectual and networking infrastructure to position the region as a "thought leader" – a highly competitive full-service provider of education and training for world markets in the new economy.

***"Ignite Enterprise;" Build an Array of Capital Financing, Business Acceleration Mechanisms***

Establish private sector-led mechanisms to accelerate business development and catalyze innovation. Enhance venture financing, as well as "angel financing" of entrepreneurial start-ups. Create Ottawa's own versions of Silicon Valley's Garage.com, and Austin's Software Atelier. Physical incubators will be a part of the concept, but aim at developing an "incubator without walls" business climate.

***"Smart Growth;" Growth-oriented, Cluster-based Infrastructure Planning***

Work quickly to address the looming infrastructure challenges stemming from continued rapid growth in Ottawa, and strive to build smartly ahead of growth. Economic analysis can highlight needs more quickly, and with greater precision than conventional demographic analysis. Develop mechanisms for linking cluster leaders directly to infrastructure planning. Move quickly in areas of airport expansion, surface transportation, office space and land use. Rely on these new mechanisms to streamline permitting processes, reduce red tape, standardize procedures, and foster agility and flexibility in government.

***"Skilling Ottawa;" New Approaches for Meeting Job Skill Requirements of Employers***

Respond quickly to the growing skills shortage. Implement creative solutions – a CEO/Education Compact – for linking the private sector to the region's education and training providers. Rely on the compact concept to provide a mechanism to ensure rapid communication of workforce needs, and feedback loops, linking top leaders of the private sector to top leaders of the region's education and training institutions.

Establish improved mechanisms for monitoring skills shortage and developing new skill sets required by the region's clusters. Continue and accelerate efforts currently underway on workforce development. Develop new and highly targeted education and training programs leveraging existing programs in the region (Technology Resource Initiative, Vitesse).

***"Gateway Ottawa;" Use Advanced Internet Technology to Link the World to Ottawa***

Take full advantage of the Internet to be Ottawa's window on the world, and the world's window on Ottawa. Build a comprehensive set of advanced Internet portals. Use this technology as Ottawa's global interface for: investors, job seekers, suppliers, business partners, travellers, etc.

***"Reinvigorating Ottawa;" On-Going Strategic Planning and Action***

Monitor the economic performance of Ottawa's mature, emerging and seed clusters.

Implement the flagship and cluster initiatives contained in this report and initiate timely review of the economic generators of Ottawa.

# Cluster Initiatives for Strengthening the Region's Economic Generators

*Cluster working groups have developed an array of action initiatives designed to address priority competitiveness challenges. Each initiative is supported by a business plan template and includes potential sources of funding, leadership and the name of a "champion" for moving the initiative forward. Several are already moving forward. Others require more development work. Together with the flagship initiatives, the 33 cluster action initiatives below comprise the primary program of work recommended in this report.*



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## **TELECOMMUNICATIONS EQUIPMENT CLUSTER**

- *Design, Launch Cluster-specific Financing Initiative*
- *Develop, Implement Job Skills Training Initiative*
- *Develop, Implement Comprehensive Human Resources Initiative*



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## **MICROELECTRONICS CLUSTER**

- *Incubate Early-stage Microelectronics Firms*
- *Link Cluster Firms to US Venture Capital Sources*
- *Market Ottawa Microelectronics*
- *Develop Cluster-specific, Near-term Strategic Action Plan*



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## **SOFTWARE AND COMMUNICATIONS SERVICES CLUSTER**

- *Prepare Videotape Showcasing Ottawa Designed to Attract Software Developers, Others to Ottawa*
- *Design, Launch an Ottawa Software Portal*
- *Enhance Industry-University Linkages*
- *Create Mechanisms for Linking Training Needs to Training Systems*



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## **PROFESSIONAL SERVICES CLUSTER**

- *Enhance Government Procurement Policies and Procedures*
- *Build “Platform for Excellence” to Enhance Cluster Competitiveness*
- *Organise a Professional Services Cluster Network*



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## **TOURISM CLUSTER**

- *Design and Implement a “Pageantry Template” Initiative*
- *Design and Launch a “Hi-tech Customer Service Program”*
- *Launch a Convention Centre Expansion Campaign*
- *Enhance Tourism Stewardship*
- *Work to Change Image of Ottawa in National Media*
- *Develop Strategy, Seek Supplemental Financing for Tourism*
- *Build “Tourism Gateways”*



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## **LIFE SCIENCES CLUSTER**

- *Develop New Cluster Resources Plan*
- *Design New Mechanism for Financing Young Companies*
- *Design and Implement “Nurturing Forums” for Early Stage Life Science Companies/Technologies*
- *Create Incubator for Start-up Biotechnology Companies*
- *Develop Bioproducts Pilot Plant Capabilities*
- *Implement Targeted Marketing and Communications Plan*



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## **PHOTONICS CLUSTER**

- *Develop Human Resources: A Joint Initiative with Vitesse*
- *Launch Comprehensive Marketing and Communications Plan*
- *Plan, Implement Key Cluster Events*
- *Develop Funding and Membership Plan for the Cluster*
- *Develop Technology Road Map*
- *Develop Strategic Plan for the Cluster*

# Conclusion

With this report, Ottawa's leaders have a key component of an overall strategic economic development plan, based on analysis and direct input from hundreds of private and public sector leaders representing the driving engines of the economy. TOP should move immediately to adopt the role of the new city's "economic development steward".

Some of the proposed action initiatives are already being implemented. Within the next few months, TOP will need to secure funding from the public and private sectors, and allocate resources to move high priority initiatives forward. Each economic agency and the new city economic development office will have a role to play as these initiatives move toward implementation.

Today, Ottawa is at a turning point – in its form of governance and with its transitioning economy. With this report, a new economic vision has been articulated, the mobilization process is in place, and "kick-starting" action initiatives are already being implemented. Now, through TOP working with its allies in the community, the plan must move forward in order to achieve the goal of a higher standard of living for Ottawa's citizens – the ultimate objective of economic development.



## Annex 'B'

# Proposed New Directions for Economic Development Organizations

### The Ottawa Partnership (TOP)

TOP will remain as an active but informal leadership group, becoming “steward” of the Ottawa economy. Will serve as an advisory group to other organizations and to the city council, and will identify gaps and overlaps in the agency workplans. Role will be to monitor factors affecting growth, with specific focus on the economic generators and on the implementation of the initiatives developed in the Economic Generators project.

### Cluster Organizations

Clusters will be encouraged to create informal or formal organizations to advance their development. Role will be to identify initiatives to grow their cluster and be a catalyst to implement these initiatives. May wish to consider administrative alignment with OCRI. Branding and marketing of the cluster to be accomplished through OED or independently by industry initiatives.

### Ottawa Economic Development (OED)

OED will be Ottawa’s “global interface”, focusing primarily on branding and marketing of Ottawa in co-operation with its clusters. Focus will be on raising the profile of the city in the appropriate markets and on attracting investment, skilled labour, customers and businesses, to the city. The Ottawa Capital Network will remain with OED as part of its marketing function. OED will be proactive in seeking co-operation with clusters and aligning with OCRI and OLSC in shaping marketing initiatives.

### Ottawa Centre for Research and Innovation (OCRI)

OCRI will continue its role as a internally-focused “business accelerator”, linking and strengthening foundation elements such as research, human resources, workforce development and infrastructure, to the respective clusters. This will be achieved in collaboration with industry, education and government.

### Ottawa Tourism and Convention Authority (OTCA)

OTCA will continue destination marketing, and expand its role to include cluster development and implementation of initiatives developed in the plan. Broaden membership and leadership to include smaller businesses such as those represented on the Tourism Cluster Working Group.

Ottawa Life Sciences Council

OLSC will continue its work in generating and supporting key factors that foster cluster development and expand its membership to include the full life sciences cluster.

Ottawa Board of Trade (OBT), Regroupement des gens d'affaires (RGA),  
Chambers of Commerce

These agencies will continue in their role as strong advocates for business interfacing with local government and in local area business development by providing networking opportunities and other services for their members. Encourage ongoing dialogue between these agencies to streamline operations, strengthen their primary advocacy role, and co-operate as that single city transaction unfolds.

Entrepreneurship Centre (EC)

The Entrepreneurship Centre has developed as part of OED. At OED's request, the EC Advisory Board has initiated a review of future plans and appropriate administrative alignment. The results of that review will be presented for consideration by TOP.