



Partnerships for Innovation



**Economic Development
Strategy Update
2015-2018**

In partnership with key economic development stakeholders, the role of the City of Ottawa's Economic Development and Innovation Department is to facilitate and promote Ottawa as a premiere destination for talent, business investment, entrepreneurship, innovation, and tourism. Through the implementation of the updated Economic Development Strategy, *Partnerships for Innovation*, the City aims to address the opportunities and challenges in today's global economy by proactively contributing to the growth of the local economy.

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Executive Summary

Today's economy is global, competitive, and rapidly evolving through technology and innovation. To excel and outperform, municipalities are proactively investing in economic development initiatives that encourage investment attraction and business expansion and retention, foster entrepreneurship and innovation, strengthen tourism, and provide the necessary tools and research to make informed decisions.

With a highly educated workforce and growing knowledge-based sectors, Ottawa is well positioned to succeed. Building on this and addressing key economic challenges such as Ottawa's historic reliance on the federal government for employment and economic growth, *Partnerships for Innovation* proposes a clear vision for economic development over the next four years. Through four key pillars of focus and a series of recommended corresponding initiatives, the City would deliver existing economic development programs as well as introduce many new programs and initiatives, further making Ottawa a premiere destination to invest, work, live and play.

AN UPDATED VISION FOR ECONOMIC DEVELOPMENT

Based on an assessment of Ottawa's economy, as well as a review of the previous strategy, *Partnerships for Prosperity*, the City's vision for economic development has been refreshed and proposes the following:

- ✓ **To be a leader in innovation for economic prosperity.**

It is through this vision that Ottawa would be at the forefront of innovation by ensuring that the City approaches and implements its delivery of economic development programs and services in a way that is both ambitious and inventive; meaning the City would proactively leverage resources and expertise and be flexible and adaptive to economic and business externalities that shape the economic landscape.

Of equal importance, economic development programming implemented by the City would afford Ottawa's businesses and stakeholders some of the necessary tools they need to innovate and prosper.

PILLARS

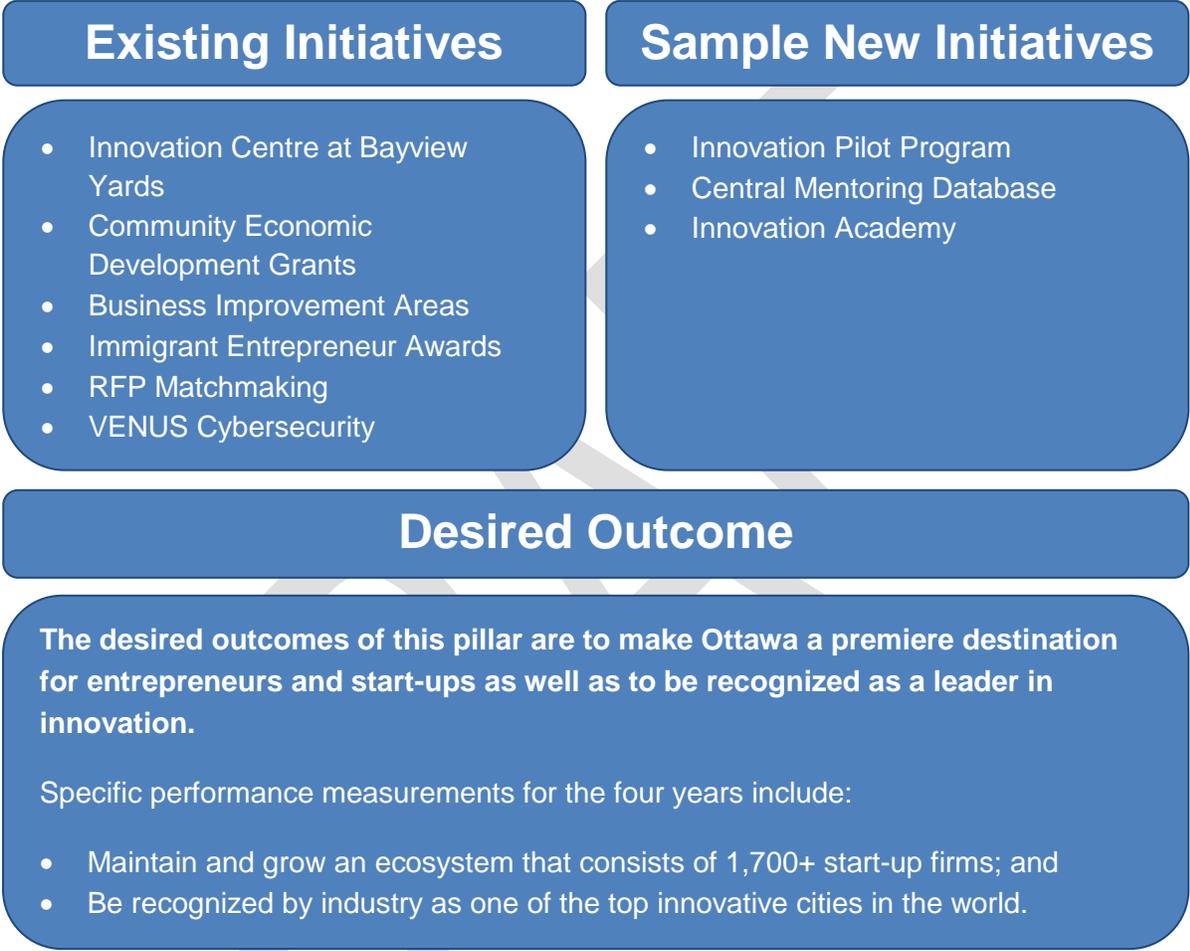
Over the next four years, the City's economic development efforts propose to focus on four strategic pillars: Investment Attraction and Business Expansion and Retention, Entrepreneurship, Tourism Development, and Research and Information Tools.

These pillars are intended to uphold the vision of *Partnerships for Innovation* and guide the implementation of corresponding initiatives that would ultimately fulfill the vision. Almost all of the initiatives would be delivered either in partnership or in collaboration with stakeholders. Each pillar has desired outcomes which would be measured throughout the life of the strategy.

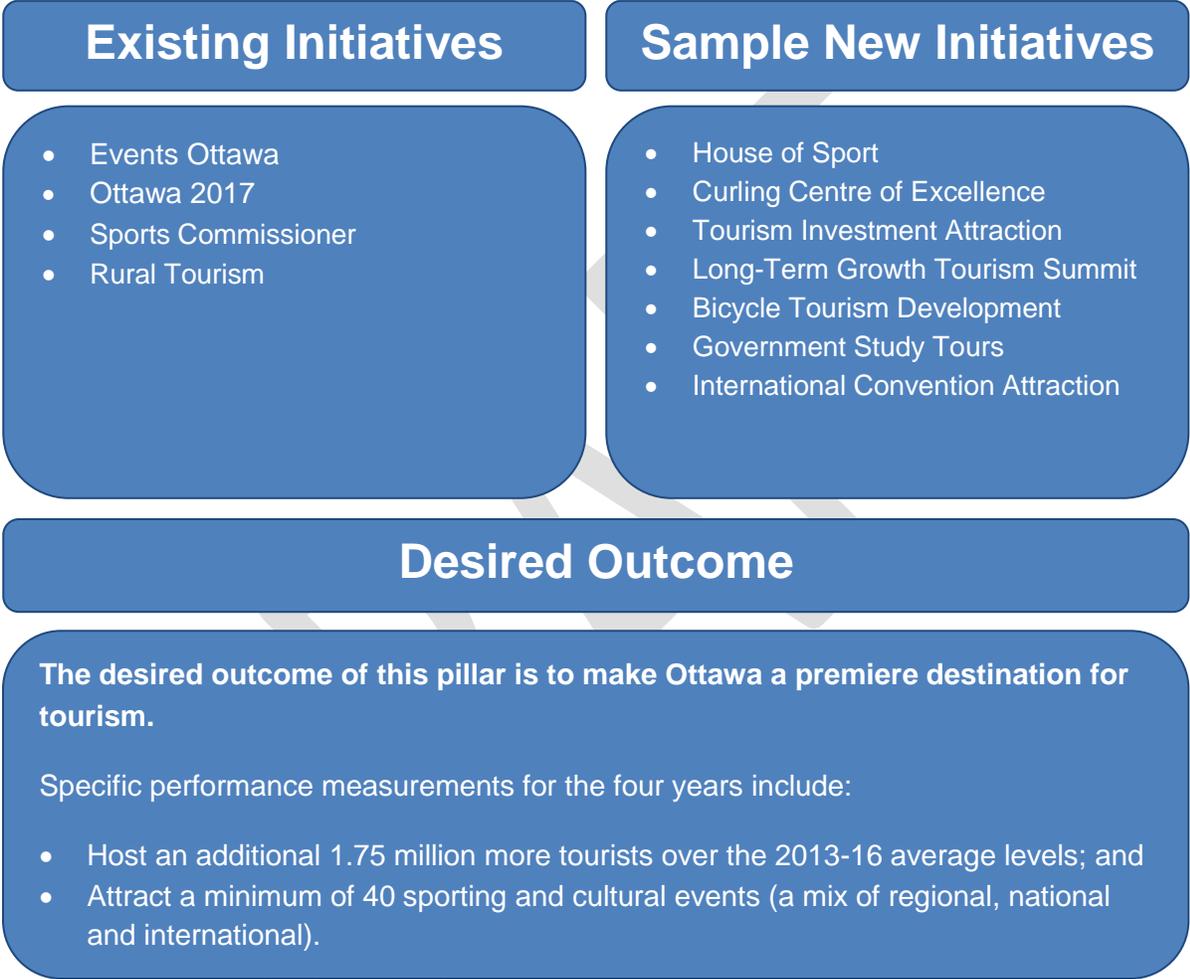
The ***Investment Attraction and Business Expansion and Retention Pillar*** centres on effectively communicating Ottawa's value proposition and engaging targeted and prospective investments to either locate or expand operations in Ottawa. Proposed economic development initiatives within this pillar are important in continuing to grow Ottawa's knowledge-based sectors and include:



The ***Entrepreneurship Pillar*** focuses on providing entrepreneurs with the tools and support they need to succeed. It also focuses on actively encouraging innovation and continuously creating a competitive advantage for Ottawa. Cities that take a proactive role in encouraging entrepreneurship and innovation position themselves as a strong destination in which to start and grow a business, ultimately outperforming competing cities. Proposed initiatives within this pillar include:



The tourism industry is one of Ottawa’s most important economic drivers. It is also an important gateway to showcasing the city as a premiere destination to live, work, and play. In an effort to expand Ottawa’s tourism offerings and visitor experience, the **Tourism Development Pillar** focuses on recommended initiatives that work towards increasing visitors and tourism spending in the city. Proposed initiatives within this pillar include:



Existing Initiatives

- Events Ottawa
- Ottawa 2017
- Sports Commissioner
- Rural Tourism

Sample New Initiatives

- House of Sport
- Curling Centre of Excellence
- Tourism Investment Attraction
- Long-Term Growth Tourism Summit
- Bicycle Tourism Development
- Government Study Tours
- International Convention Attraction

Desired Outcome

The desired outcome of this pillar is to make Ottawa a premiere destination for tourism.

Specific performance measurements for the four years include:

- Host an additional 1.75 million more tourists over the 2013-16 average levels; and
- Attract a minimum of 40 sporting and cultural events (a mix of regional, national and international).

The strategy’s last pillar of focus is **Research and Information Tools**. Understanding that research, data, and information help organizations to make informed decisions, this pillar focuses on providing key economic development stakeholders with the research and information tools they need to make strategic decisions. Proposed initiatives within this pillar include:



NEXT STEPS

Upon Council’s approval, in partnership with economic development stakeholders, the City’s Economic Development and Innovation Department would execute and implement the initiatives contained within *Partnerships for Innovation*. Given the magnitude of the initiatives and the resources of the Department, not all initiatives are proposed to be implemented in the first year but would follow over the course of the next four years. Each year, through the Economic Development Strategy Implementation Plan and Progress Report, the Department would report on the progress of implementation as well as the annual rollout plan and more detailed performance metrics.

Ottawa's Vision for Economic Development

To succeed in today's competitive global economy, cities must be mindful of the many forces that influence economic prosperity.

In a world where urban centres compete for talent and investment, and knowledge-based sector growth has become one of the primary avenues to economic prosperity, municipalities around the world are taking an expansive approach to economic development centred on addressing opportunities and challenges present in today's marketplace. The ability to innovate for businesses and cities has become the determining factor as to who comes out on top.

Partnerships for Innovation draws upon forces and factors that affect Ottawa's economy and proposes four key pillars to enhance the City's economic development efforts. These pillars include: Investment Attraction and Business Expansion and Retention, Entrepreneurship, Tourism Development, and Research and Information Tools. In tandem with one another, they support an innovative and refreshed vision for economic development that focuses on accelerating economic growth and achieving a higher level of job and business creation across the city.

The City's vision for economic development:

✓ **To be a leader in innovation for economic prosperity**

It is through this proposed vision that Ottawa can position itself to be at the forefront of innovation by ensuring that the City approaches and implements its delivery of economic development programs and services in a way that is both ambitious and inventive; meaning the City proactively leverages resources and expertise and is flexible and adaptive to economic and business externalities that shape the economic landscape.

Of equal importance, economic development initiatives implemented by the City would continue to afford Ottawa's businesses and stakeholders some of the necessary tools they need to innovate and prosper.

Taking concrete steps to foster innovation in all areas of economic development would ensure that Ottawa is in an ideal position to realize its economic potential today, tomorrow, and in the future.

Opportunities Shaping our Economy

The 21st century economy is highly integrated and rapidly evolving. Technological advances continue to alter processes by which business is conducted and underlines the perpetual need to innovate. Countries such as India and China have emerged as growing economic superpowers creating a more complex, dispersed, and competitive playing field. As a result, cities around the world, in advanced markets and emerging economies, are faced with a similar set of economic challenges and opportunities.

Globalization and the importance of knowledge-based economies have presented companies with countless opportunities to invent, reinvent and introduce new products and services. Competition for business investment and talent has increased and frontiers of the global marketplace have expanded.

These factors inescapably influence the delivery of economic development programming and have shaped the direction and focus of the City's proposed strategy.

GLOBALIZATION

Today's economy is an amalgam of investment opportunities and technological advancement, interspersed with cities acting as the centres of growth, employment, and productivity. This presents municipalities with a broad range of opportunities and challenges, particularly concerning economic competition and expanded business prospects. At present, cities compete on all points of the economic spectrum, from the provision of goods and services offered by businesses to the ability to retain and attract knowledge-based employment.

Notwithstanding increased competition, globalization has also expanded international trade and opened new consumer markets, presenting cities with countless business development opportunities. Local economic development efforts and programs play a vital and necessary role in connecting businesses with worldwide export and expansion opportunities.

Cities that recognize and capitalize on opportunities in the international marketplace and invest in local knowledge-based growth and innovation are better positioned to succeed in the globalized economy.

KNOWLEDGE-BASED ECONOMIES

A knowledge-based economy is an economy where productivity and growth are based on the production and transfer of knowledge. Cities are increasingly dependent on knowledge, information, technology, and skilled talent as a means by which to innovate and increase productivity levels; those that actively advance progress in knowledge-based economies are better aligned to achieve prosperity. With a high proportion of Ottawa's population employed in highly skilled knowledge-based occupations like computer and information systems, the city is well positioned to excel.

THE IMPORTANCE OF TALENT

The capacity to attract and retain talent is important for long-term prosperity. Over the coming decades, the global labour market will be affected by a number of significant trends, including a shift in demographics resulting in slow growth of the working population and increased competition for talent. Challenging employment opportunities are available worldwide, which has opened up many new markets to a workforce that is mobile and driven by attractive employment opportunities and local amenities. The capacity to attract and retain talent is critical to sustained success and presents the need to develop attraction and retention tools in partnership with local stakeholders. As such, policies and programs that encourage labour force participation and continuous skills development are necessary to grow and maintain the talent base.

INNOVATION AND COMMERCIALIZATION

The capacity to innovate is a fundamental component of the knowledge-based economy and a key driver of productivity. Countries and cities that excel in innovation and commercialization heighten their capability to attract investment and talent and differentiate themselves. The role of innovation will become increasingly important as labour market growth stalls.

Though Canada is home to numerous excellent post-secondary institutions and technical colleges, continuous measures should be taken to ensure that research and ideas are converted into commercial products that provide an innovative advantage.

This challenge presents the opportunity to capitalize upon one of Ottawa's core strengths: a highly educated workforce capable of developing products and services that encourage innovation and are conducive to commercialization.

Ottawa's Economic Performance

OUR ECONOMY

The Ottawa-Gatineau Census Metropolitan Area (CMA), the sixth largest metropolitan area in Canada, is home to an estimated 1.3 million residents¹ and is a vibrant and growing community that prides itself on an exceptional quality of life.

Unlike other metropolitan cities in Canada, the presence of the federal government heavily impacts Ottawa's economy including its growth and employment.

Almost 30 per cent of the city's economic activity² and one-third of employed residents are attributable to the public sector³, which includes all three levels of government and government funded organizations like universities and hospitals. Further, many of the private sector organizations in the city exist primarily to provide goods and services to the government sector.

Over the past few years, Ottawa's economy has been growing at a modest pace, due mostly to federal public service cutbacks implemented in 2012. With federal workforce reductions expected to continue through to the end of 2017, the Conference Board of Canada is predicting low, but slowly rising Gross Domestic Product (GDP) gains for the Ottawa-Gatineau CMA over the upcoming years.

Although the City did not directly anticipate this downsizing, it has long been recognized that dependence on a single large employer and economic engine can be problematic.

Compared to other CMAs in Canada, Ottawa-Gatineau experienced the smallest growth of employment between 2011 and 2014, increasing just 3.2 per cent⁴. Across Canada, the cities of Calgary and Edmonton preformed the best on a per capita basis, growing their employment by 11.0 and 9.6 per cent, respectively⁵.

Over the course of the City's previous strategy, *Partnerships for Prosperity*, a concerted effort was made to lay the groundwork for reducing reliance on the federal government for employment and economic growth and diversifying the economy. This was done in three key ways; by supporting the advancement of knowledge-based sectors, investing in tourism and major events attraction, and encouraging and supporting entrepreneurship as a career choice.

Since then, considerable progress has been made in attracting high-profile events to the city, growing new businesses, and proactively investing in the knowledge-based sectors

of aerospace, security and defence; cleantech; digital media; film and television; wireless and telecom; photonics; life sciences; and software.

Attracted by the city's highly educated and talented workforce, undeniable quality of life and affordable living, Ottawa continues to be home to many global high-tech leaders such as Shopify, Huawei, Ericsson, and Cisco.

Economic development efforts continue to pave the way in making Ottawa more resilient to externalities that might otherwise hinder the region's economic growth.

Over the coming years, continued diversification of Ottawa's economy and its ability to foster innovation and entrepreneurship will be essential to ensuring economic prosperity for the future.

The city's educated workforce will aid in promoting and attracting private sector investment and innovation, making Ottawa a growing economic destination in which to work, live, visit, and play.

KNOWLEDGE-BASED SECTORS, INNOVATION AND ENTREPRENEURSHIP

Ottawa's knowledge-based industry is comprised of nearly 1,700 companies⁶ representing diverse sectors, including high-tech, wireless, photonics, defence and security, life sciences, clean technology, digital media, and film and television production. Hundreds of entrepreneurs, start-ups and international companies call Ottawa home.

With a large pool of highly skilled workers, Ottawa has grown into a research-intensive, business-savvy city with a strong spirit for innovation. The city's extensive research infrastructure includes the National Research Council, the country's leading research institution, and many other federal and academic research institutions. Moreover, Ottawa leads the country in research and development spending, with an estimated \$3 billion in total public and private funding spent annually⁷.

Invest Ottawa's services in the areas of entrepreneurial mentorship, start-up development, and commercialization have successfully facilitated the city's entrepreneurial momentum, wealth, and job creation.

A few incubators and accelerators, including those at Invest Ottawa, operate throughout the city, and are designed to incite innovation, entrepreneurial spirit and connectivity of the business community. One of the City's flagship projects, the Innovation Centre at

Bayview Yards, expected to open in the fall 2016, will further foster and encourage this trend.

Nonetheless, more must continually be done to proactively attract investment and foster entrepreneurship and innovation. In particular, a new series of initiatives in the areas of knowledge-based investment attraction and innovation would provide the City with continued tools and resources to attract and create business.

OUR WORKFORCE

Ottawa is a magnet for the world's best and brightest talent. The city's workforce is the most educated in Canada with 61 per cent of workers having at least one post-secondary degree⁸. Ottawa also holds the highest concentration of engineers and scientists than anywhere else in the country⁹. The strength of Ottawa's workforce has played a pivotal role in its emergence as a global knowledge-based and technology centre.

While approximately 70 per cent¹⁰ of Ottawa's population is categorized as working age (ages 15 to 64), which is similar to other cities around the world and in Canada, the size of the city's available workforce is gradually shrinking due in large part to aging baby boomers and lower fertility rates. If these trends continue, it can be extrapolated that within 10 years, the working-age population in Ottawa would be reduced to less than 70 per cent of today's total.

Further, while the city's population has grown at a modest pace between 2011 and 2013, Ottawa lags behind other major centres in Canada in terms of attracting new residents.

This, coupled with an aging population, requires the implementation of proactive economic development initiatives that are designed to retain and attract the best and brightest to Ottawa.

TOURISM

Ottawa's tourism sector is an important component of the local economy. As the nation's capital, the city is home to a number of national and local heritage and cultural institutions, making it a key destination for tourists. Similarly, as home to the majority of federal government departments, the city is also a major destination for corporate and convention travel.

In 2012, the Ottawa-Gatineau CMA welcomed approximately 10.5 million visitors, an increase of 5.6 per cent from 2011.¹¹ Visitor spending results in billions of dollars injected into the local economy, and has kept Ottawa's hotel industry healthy with the average hotel occupancy rate for the Ottawa-Gatineau CMA at 69.8 per cent in 2014.¹²

Attracting large-scale cultural and sports events to Ottawa has been integral to the City's strategy for further bolstering the tourism industry in the region.

With the opening of the Shaw Centre (formerly the Ottawa Convention Centre) in 2011, the EY Centre in 2012, and Lansdowne Park in 2014, the City significantly increased its capacity to host large-scale business conventions and major cultural and sporting events.

In 2011, the City partnered with Ottawa Tourism to create Events Ottawa, a major event office responsible for proactively targeting and attracting a diverse set of major events to Ottawa. These events provide significant economic impact and national and international exposure to the city. Since the launch of Events Ottawa, the combination of bids won and events hosted will result in close to \$57 million for Ottawa's economy by 2018.

Continued investment in tourism, including Ottawa 2017, leveraged success of Events Ottawa, and new tourism development initiatives will ensure that tourism remains a growing and vibrant industry.

Ottawa's Economic Development Eco-System

The City's previous economic development strategy, *Partnerships for Prosperity*, focused largely, as its name suggests, on delivering economic development programs and initiatives by working in partnership with Ottawa's many economic development stakeholders.

The creation of two new important partnerships was, and continues to be, instrumental in driving the City's economic development vision and agenda forward. These partnerships include the formation of an arm's-length economic development agency called Invest Ottawa, and a major events attraction office called Events Ottawa, a partnership with Ottawa Tourism. Additionally, the Ottawa Council of Business Improvement Areas (OCOBIA), a new body representing the city's Business Improvement Areas (BIAs), was formed to advance the ability of BIAs to effectively act as agents for economic stimulation.

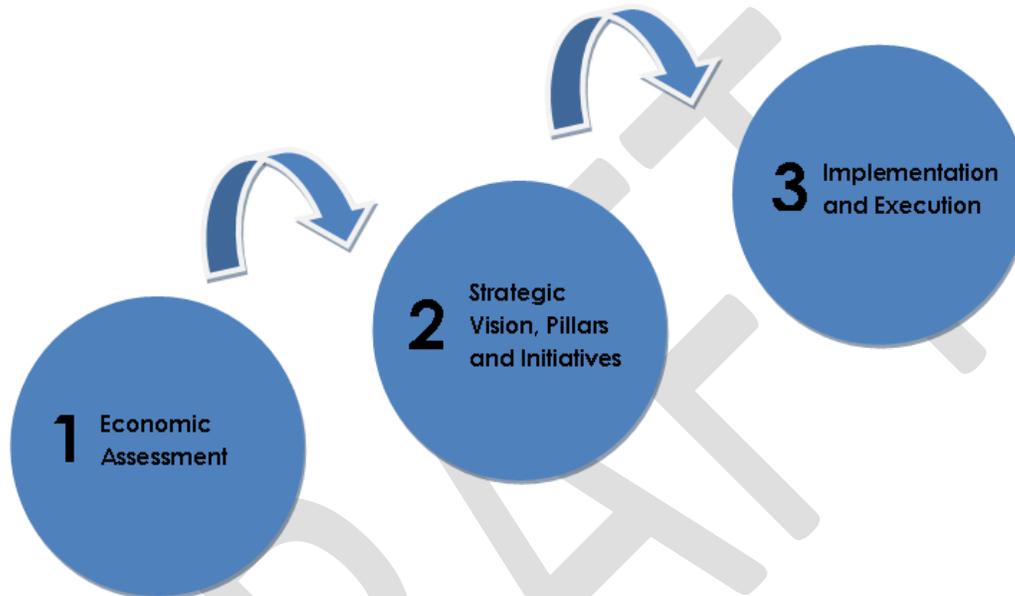
Together, these entities and other facilitators of economic development — the Ottawa International Airport Authority, post-secondary institutions, Chambers of Commerce and the West Ottawa Board of Trade, the Shaw Centre, the EY Centre, the Senators Sports and Entertainment Group, the Ottawa Sports and Entertainment Group (OSEG), the Ottawa-Gatineau Hotel Association (OGHA), the Ottawa Community Loan Fund (OCLF), and many others— work in tandem with clear lines of responsibility and effective leadership, to attract investments and talent , encourage entrepreneurship and innovation, further tourism, and propel economic prosperity.

Partnerships and collaboration have proven to be effective in leveraging resources and employing an innovative approach to service delivery and problem-solving, continuously positioning the city to thrive in today's relentlessly competitive marketplace.

Over the next four years, partnerships and innovative service delivery are proposed to continue to be integral to the implementation of this strategy. All initiatives would be approached with an innovation lens and the implementation of certain initiatives would lead to enhanced and more formal partnerships while others would lead to the creation of new partnerships.

Strategy Development

The development of *Partnerships for Innovation* included a three-phase process, as illustrated below, commencing with a comprehensive review of Ottawa’s economy and concluding with a series of initiatives and tools proposed to be implemented over the course of 2015 to 2018.



The process undertaken follows a typical strategic planning approach whereby the review of Ottawa’s economy resulted in an updated understanding of the city’s current economic landscape, including strengths and opportunities, and armed with that, informed a renewed economic vision for the future and the proposed steps to be taken to achieve the vision. Put simply, the updated strategy addresses, specific to the economy and economic development, where the city is now, where the city wants to be in the future, and how it should get there.

Every effort was made to ensure that *Partnerships for Innovation* aligns with, and is complementary to, the plans of Invest Ottawa, Ottawa Tourism and the City’s other partners in economic development service delivery. Additionally, the strategy also aligns with the objectives laid out in related City plans such as the City’s Strategic Plan and the Official Plan. Related strategies and economic development partners are referenced throughout the document.

PHASE 1: ECONOMIC REVIEW

A comprehensive assessment of a city's economic health is important to identifying and understanding areas of strength, weakness, and opportunities, as well as global forces affecting local economic trends. With this in mind, a review of Ottawa's economy was undertaken to identify areas in which Ottawa can build on its economic assets, seize opportunities, and confront challenges. Reports and data published by the Conference Board of Canada, Statistics Canada, and other research entities were utilized in informing this review.

Throughout the life of *Partnerships for Innovation*, the City would continue to monitor Ottawa's economy. Depending on the nature of changes to the economy, initiatives may be refined and new initiatives may be proposed in an effort to address changes affecting the city's dynamic business climate.

PHASE 2: STRATEGIC VISION, PILLARS AND INITIATIVES

The economic review conducted as part of Phase 1, resulted in a proposed updated vision for economic development as well as four proposed strategic areas of focus. These four strategic areas, called pillars, each correspond to an individual set of recommended related initiatives. The four pillars of focus within *Partnerships for Innovation* include: Investment Attraction and Business Expansion and Retention, Entrepreneurship, Tourism Development, and Research and Information Tools. The vision, pillars, and proposed initiatives align with Ottawa's economic strengths and address and confront the City's challenges and upcoming opportunities.

Also informing the vision and initiatives was a review of the implementation and accomplishments of the City's previous strategy, *Partnerships for Prosperity*, as well as best practice research.

A retrospective review of the previous strategy provided an understanding of achievements over the past four years, including the status of economic development programming in Ottawa. Much of this time was spent learning from past experience, and the City's ability to adapt quickly to changes in the economy. *Partnerships for Innovation* and the recommended initiatives contained herein reflect and incorporate this review.

Best practices also provided insight into economic development trends and identified potential areas in which the City could improve service delivery. Research findings have been incorporated into recommended initiatives, making certain that Ottawa stacks up

strongly amongst competing cities and is on the leading edge of economic development programming.

Partnerships for Innovation's suggested vision and initiatives were developed in consultation with a variety of economic development stakeholders including internal City departments and external partners. See Appendix 1 for a list of those consulted.

The City's partners and stakeholders in the multifaceted areas of economic development play a vital role in leveraging and delivering economic development programs, with their feedback being an essential component in ensuring the strategy aligns with the needs and priorities of the business community.

Feedback from consultations has been incorporated into the updated strategy and the parameters of each proposed initiative.

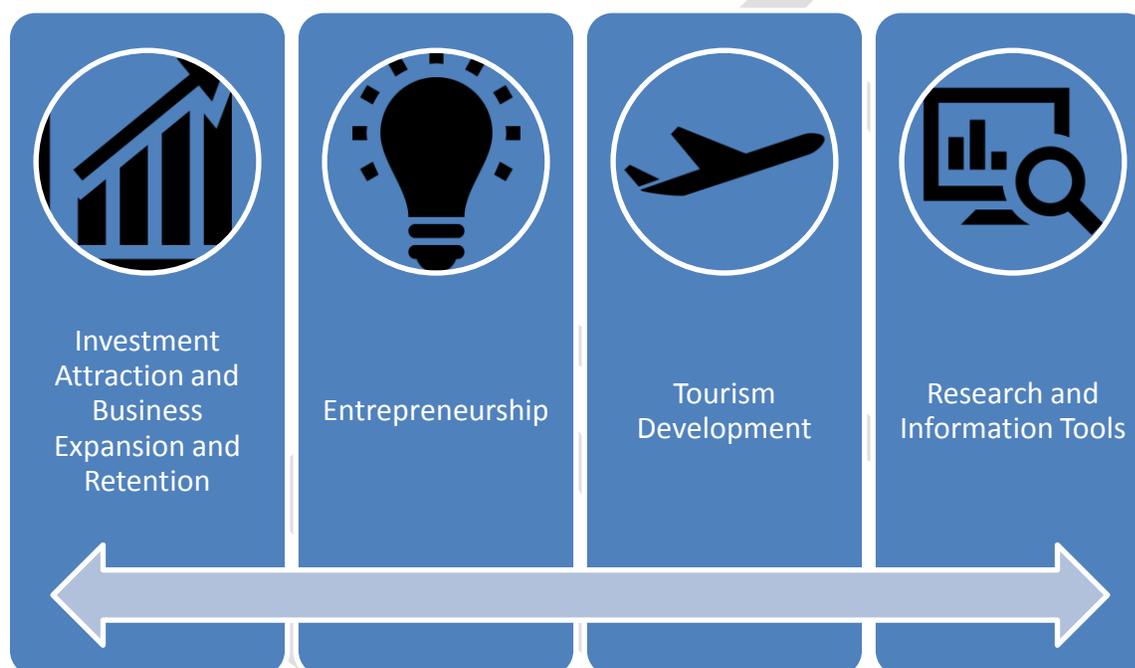
PHASE 3: IMPLEMENTATION AND EXECUTION

Upon approval, the City's Economic Development and Innovation Department will execute and manage the implementation of *Partnerships for Innovation*. This will be done through the Economic Development Strategy Implementation Plan and Progress Report that will be brought forward to the Finance and Economic Development Committee and Council for approval on an annual basis. The report will outline when proposed initiatives within the strategy will be implemented and identify resources. The report will also provide more detailed information on the proposed initiatives such as time-specific rollout plans and estimated costs. Likewise, the report will provide an up-to-date report on the implementation progress of *Partnerships for Innovation*.

Because the strategy serves as a high-level roadmap and framework for economic development, the City may, in consultation with stakeholders, adapt and implement new initiatives in an effort to address emerging opportunities, as is deemed necessary. An ongoing review of the strategy and the Economic Development Strategy Implementation Plan and Progress Report will serve as a benchmark to ensure that the City remains on course.

Four Pillars of Focus

Using Ottawa's economic strengths and opportunities as a starting point, *Partnerships for Innovation* focuses the City's economic development efforts on four proposed strategic pillars: Investment Attraction and Business Expansion and Retention, Entrepreneurship, Tourism Development, and Research and Information. The pillars are intended to uphold the strategy's recommended vision and guide the implementation of corresponding suggested initiatives that ultimately aim to fulfill this vision.



Together, the pillars and related initiatives drive economic development, continuing to make Ottawa a prosperous place to work, invest and live.

The subsequent pages of *Partnerships for Innovation* describe each pillar and provide a comprehensive overview of economic development initiatives proposed for the next four years.

The initiatives have been categorized by existing and new. In some cases, existing initiatives are proposed to be enhanced while others would remain the same. New initiatives are proposed initiatives that the City would employ over the next four years.

Many initiatives within the strategy may be delivered in partnerships with internal City departments or external economic development stakeholders. These partnerships are

identified at the outset of each pillar as well as within the description of each initiative. Additionally, related and complementary initiatives and strategies are also identified.

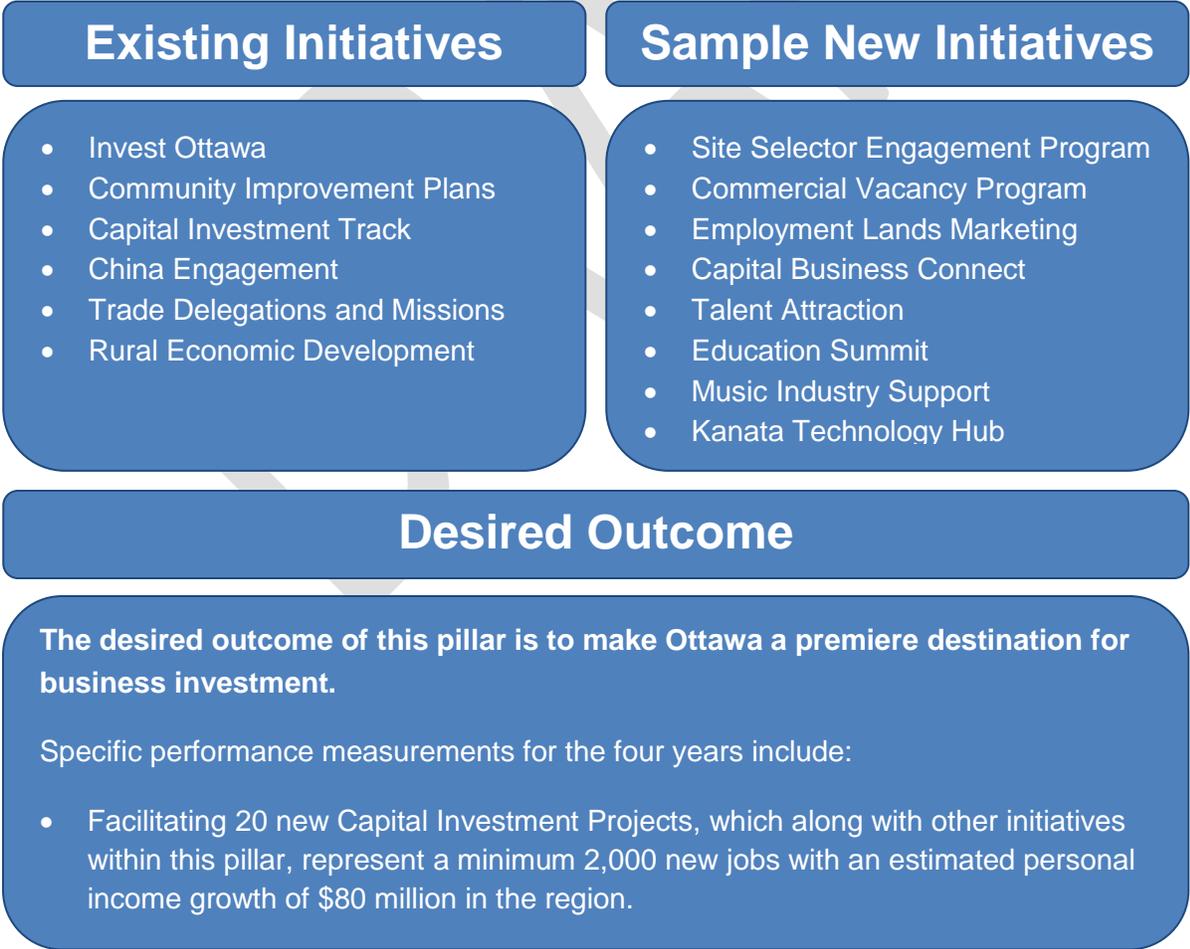
Lastly, desired outcomes are highlighted for each pillar. These desired outcomes are intended to be achieved by the end of the strategy and would be reported on at such time. More detailed performance measures for each initiative would be provided and reported on as part of the Economic Development and Innovation Department's Economic Development Strategy Implementation Plan and Progress Report.

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Pillar 1: Investment Attraction and Business Expansion and Retention

Investment attraction and business expansion and retention efforts are important in diversifying and growing economies. Effective efforts focus on communicating the city’s strengths, while maintaining and drawing in the interest and investments that contribute to innovation, job creation, and growth. Competition for global investment capital is fierce, and cities that stand out with exceptional talent, incentives, support programs, a high and vibrant quality of life, and a welcoming approach to businesses and newcomers, effectively employ attraction, expansion and retention tools as a means of success.

For Ottawa, enhanced investment attraction, expansion and retention activities are crucial to growing key knowledge-based sectors and reducing the city’s reliance on the federal government as a principal employer and engine of growth.



To successfully deliver the above initiatives, the City would work collaboratively with a variety of external stakeholders including Invest Ottawa, Ottawa Tourism, the Ottawa International Airport Authority, Ottawa's post-secondary institutions, the Province of Ontario, the Department of Foreign Affairs and Trade, the Ottawa Chamber of Commerce, the Orléans Chamber of Commerce, the West Ottawa Board of Trade, Ottawa's commercial brokers, commercial property owners, and BIAs.

Internally, these initiatives would be delivered in cooperation with the Finance Department, Planning and Growth Management, Legal Services, Corporate Communications, and Event Central.

Internal strategies and plans related to this pillar include the City's Strategic Plan, the Official Plan, and the Employment Lands Strategy.

Externally, related plans include Invest Ottawa's Strategic Plan, Ottawa Tourism's Strategic Plan, and the Airport Master Plan.

EXISTING INITIATIVES

Invest Ottawa

One of the major accomplishments of *Partnerships for Prosperity* was the restructuring of the former Ottawa Centre for Research and Innovation (OCRI) into Invest Ottawa, an arm's-length organization that delivers collaborative economic development programs in the areas of entrepreneurship, business incubation services, commercialization, targeted sector development, investment attraction, business retention, expansion, and global trade development.

Since its inception, Invest Ottawa has been instrumental in offsetting federal government job loss by focusing efforts on job creation, sector diversification, and entrepreneurship. Over the course of the strategy, the City's support for Invest Ottawa would be augmented to ensure that it continues to have the necessary resources and tools to build on success and contribute to momentum. This would be achieved by increasing funding, providing support to develop a resource to support small and medium businesses, and by creating a Film and Television Guidelines or By-Law to boost this area of Ottawa's creative industries.

Increase Funding

The City of Ottawa is Invest Ottawa's major funder. City funding is provided to Invest Ottawa under an Annual Operating Plan, which outlines funding terms and program

delivery expectations. Any future funding would be targeted towards three areas: raising the awareness of Ottawa in key markets, retaining and attracting top talent, and supporting small and medium enterprises.

Small and Medium Enterprise (SME) Development

Small and Medium Enterprises (SMEs) span a number of industries and are an integral part of the country's economy. It is important that cities actively cultivate and nurture the growth of companies within this realm. By virtue of their size, most SMEs confront a similar set of challenges that limit ease of expansion and growth, often holding businesses back from becoming world-class corporations. These challenges can include lack of access to capital, underinvestment in research and development and technology, and a shortage of management skills. To assist SMEs in overcoming these challenges, Invest Ottawa would create a business development resource to focus on SMEs. It would be the role of this resource to help support Ottawa's SMEs.

Film and Television Sector Support

One of Invest Ottawa's key areas of sector focus is film and television. On average, Invest Ottawa facilitates approximately 800 film shooting days annually. This translates into more than \$50 million of production of which \$20 million is spent directly in the local economy. While this industry is much smaller than Ottawa's tourism or technology sectors, it has the ability to promote and brand the city on both a national and international level, while enhancing the city's thriving creative industries.

Over the past four years, Invest Ottawa has provided support to local production companies through services such as site selection assistance, job fairs, and a one-stop-shop for permit approval. Additionally, emphasis has been placed on sector growth and promoting Ottawa as a preferred destination for production.

One of the commonly expressed concerns of filming in Ottawa is that the City is not "film friendly" and many costly and time-consuming obstacles impede effective production.

To reduce these barriers, the City would explore the possibility of developing Film Friendly Guidelines or a by-law. The purpose of the by-law or guidelines would be to formally outline the City's responsibilities in supporting film and television production and expectations of production companies filming on City property. It would also lay out timelines to respond to requests in a timely manner and allow the City to exercise flexibility in addressing special or unusual requests, which is common to this industry.

Community Improvement Plan Program

Financial incentives and municipal programs that support businesses, contribute to making a city an attractive place for business investment and expansion. When companies are considering expanding or relocating operations, one of their many deciding factors includes the availability of incentive programs.

Complementary to the business investment and expansion services offered by Invest Ottawa, the City introduced two pilot Community Improvement Plan Programs (CIPs) in 2013 as a means to potentially stimulate business investment and expansion.

The two CIPs initiated included one in Orléans and the other on a portion of Carling Avenue. As part of the CIP programs, businesses in either key sectors or designated areas are eligible for financial incentives in the form of tax increment financing.

The CIP program is used primarily as a vehicle to encourage business attraction, stimulate urban renewal, and create jobs.

Over the course of the next four years, expanding the CIP program to add new urban renewal CIPs as a method of stimulating private investment in commercial neighbourhoods where commercial renewal has been non-existent or sluggish is proposed to be explored.

Along with that, new forms of financial incentives would also be examined. It has been found that tax incremental financing may not be enough to entice CIP participation in smaller areas or designated streets as would immediate incentives such as grants or loans. The City of London (Ontario), for example, offers interest free loans, loans and grants to assist property owners with facade improvements, interior building improvements and street level retrofits, respectively.

Potential new areas for CIP exploration include Chinatown, Bells Corners, Vanier and other neighbourhoods that may benefit from renewal investment.

It is expected that such projects would include the following: space expansions, façade renewal, demolition, replacement, and building upgrades.

Criteria for identifying areas where a CIP could be considered would be the presence of one or more of the following conditions:

- A large pool of properties with existing structures which would not only benefit from improvement, but if upgraded, would result in increased assessment and

corresponding increases in property taxes. Note: the program will not be considered for “greenfield” properties;

- Clear evidence of significant commercial (retail or office) vacancies or a trend indicating that the condition would not likely be remedied without some form of intervention; and
- Clear evidence that commercial renewal has been non-existent or sluggish in the area, where there is significant presence of tired or dilapidated and possibly unmarketable buildings, which if upgraded, would result in greater marketability and increased economic activity.

Beyond the urban renewal CIPs, a CIP is proposed to be examined for the Innovation Centre at Bayview Yards. The funding formula for the Innovation Centre includes a requirement for the City to provide tax and City fee relief as part of its contribution. The merits of implementing a site-specific CIP or implementation of a Municipal Capital Facilities Agreement would be considered to satisfy this requirement.

The Economic Development and Innovation Department would continue to work closely with the Planning and Growth Management Department to ensure that CIPs align with the objectives of the Official Plan and Employment Lands Strategy.

Capital Investment Track Program

In 2012, the City introduced the Capital Investment Track Program (CIT). This concierge program guides strategic investment projects through City requirements and processes, such a planning and building code, in a timely and efficient manner.

Priority projects are assigned a dedicated Account Manager to provide guidance and ensure all issues relating to the project are resolved in a timely and effective manner. Participants in the CIT program have provided positive feedback on how this proactive attention from City Hall has assisted in moving investment plans forward in a timely fashion.

The program is part of the City’s and Invest Ottawa’s investment attraction tool-kit and is promoted to companies looking to establish operations in Ottawa. It is equally promoted to local companies looking to expand operations within the city.

Over the next four years, the existing CIT program would continue to provide services to priority projects. Additionally, part of the program would be tailored to the Commercial Vacancy Program so as to encourage further investment in areas exhibiting high vacancy trends.

The Economic Development and Innovation Department would continue to actively engage with CIT partner departments which include, among others, Planning and Growth Management, Infrastructure Services, and Environmental Services.

China Strategy

The People's Government of Beijing Municipality and the City of Ottawa have maintained a close relationship since Ottawa-Beijing Friendship Cities Relations was created in 1999. To further reinforce and strengthen the friendship cities connection, an agreement was mutually signed by both cities in Beijing on October 14, 2013, and is valid for five years from the date of signing. The Mayor of Beijing and the Mayor of the City of Ottawa have committed to deepen exchanges and cooperate in mutually beneficial activities.

Over the next four years, the Economic Development and Innovation Department would continually work towards the following:

- Strengthening business relationships with the efforts of Invest Ottawa;
- Taking the lead in facilitating cultural and art exchanges and performances;
- Supporting education exchanges and training for students and teachers;
- Facilitating an increase in tourism from Chinese citizens with leadership from Ottawa Tourism; and
- Continuing to recommend opportunities for mutual learning in municipal administration.

Trade Delegations and Missions

The City and Invest Ottawa regularly receive international delegations and trade missions of political and business nature. These meetings support the City's efforts in developing the international linkages and relations required for business transactions. The Economic Development and Innovation Department, in partnership with the Protocol Office and Invest Ottawa, would continue to welcome delegations to Ottawa.

Additionally, the City would continue to support Invest Ottawa in any trade missions it undertakes and will participate as necessary.

Rural Economic Development

One of the distinct features of Ottawa is its large rural component. According to the City's 2012 Employment Survey, Ottawa's rural area accounted for 4.5 per cent of jobs

in the city, and in the five years prior to 2012, jobs in the rural area increased by approximately 16 per cent.

The City places a strong emphasis on economic activities in Ottawa's rural areas and the City's Rural Affairs Office has the primary responsibility of serving rural Ottawa. Beyond this, the Economic Development and Innovation Department, in partnership with Invest Ottawa, would highlight and involve rural areas in existing and new economic development initiatives. Initiatives and programs include hosting entrepreneurial sessions in rural areas, highlighting rural areas for the Site Selector Program and Tourism Investment Attraction initiative, Ottawa 2017, and encouraging rural businesses and entrepreneurs to participate in the Innovation Pilot Program and Capital Business Connect Program.

SAMPLE NEW INITIATIVES

Site Selector Engagement Program

One of the primary roles of the City is to act as a facilitator and promoter of economic opportunities. With a comprehensive and sector-specific understanding of business opportunities and available employment lands, the City, in partnership with Invest Ottawa, the Planning and Growth Management Department, BIAs, and other economic development stakeholders, would proactively promote and connect opportunities and investments with site selectors around the world.

The intention would be to employ outreach tools and techniques that would include: developing new and powerful marketing materials; participation in site selector and real estate trade shows; targeted email blasts; advertising in trade publications; and creating new relationships with top site selector firms around the globe that focus on sectors most relevant for Ottawa.

To maximize performance, emphasis would be placed on facilitating investment opportunities where anchor companies can play a role in creating, either directly or indirectly, spinoff companies and companies with the ability and drive to further increase sector development and synergies. To derive maximum performance, the program would showcase the City's designated employment lands inventory, areas with high commercial vacancies, and rural areas.

By centering the program on Ottawa's strengths and value proposition, including promotion of Ottawa's highly educated workforce, high standard of living, a vibrant and

welcoming community, and new modern transit infrastructure, the program would foster the identity of Ottawa as a key destination for talent, business, and investment.

Commercial Vacancy Program

The economic implications of rising commercial vacancy rates for local economies and municipalities can result in lost City revenues as well as lifeless and sluggish neighbourhoods.

To revitalize areas in Ottawa showing long-term commercial vacancy trends, the Economic Development and Innovation Department would actively promote these areas, through the proposed Site Selector Program, Employment Lands Marketing, and investment attraction and expansion efforts.

One example of an area experiencing increasing commercial vacancy rates is the city's downtown office market. A vibrant downtown core contributes to Ottawa's overall vitality and its success in attracting and retaining talent and investment. The health of Ottawa's downtown office market is influenced by several factors, including business decisions made by the federal government whose various departments occupy a sizeable amount of space downtown.

For example, the Government of Canada Workplace 2.0 Standards program has resulted in an average 20 per cent reduction in office space occupied per employee and has imposed quality standards for buildings, including LEED and accessibility, which many older downtown Ottawa office properties lack. Moreover, the federal government has begun the process of consolidating its office space into employment areas outside the downtown core, all which have resulted in lower demand for office space downtown.

To this end, a Commercial Vacancy Program would focus not only on facilitating the revitalization of areas with long-term vacancy trends, it would also tailor tools, such as the CIT and CIP programs, and participate in branding, marketing and investment attraction initiatives.

Employment Lands Marketing

The City's Employment Lands Strategy is being updated by the Planning and Growth Management Department in 2015. The Economic Development and Innovation Department would work in collaboration with the Planning and Growth Management Department to ensure the strategy meets the needs of Ottawa's business community and aligns with the vision and pillars of *Partnerships for Innovation*.

Upon completion of the Employment Lands Strategy, the Economic Development and Innovation Department would aggressively promote and market employment lands, through vehicles such as the Site Selector Engagement Program and the Commercial Vacancy Program, to prospective investors, encouraging development in areas conducive to driving key sector growth.

Capital Business Connect

As a G7 capital and host to approximately 130 diplomatic missions and consulates, Ottawa is one of the richest international hubs in North America.

Capital Business Connect is a service that would endeavour to connect the diplomatic community and foreign investors with quality business resources and referrals required to start or expand business operations in Ottawa. It would also be a one-stop-shop for business questions.

Capital Business Connect will promote Ottawa's strengths as a prime location for foreign interests by providing referral services in the following areas:

- Business Services;
- Business Culture;
- Academia and Research;
- Partner and Talent Identification;
- Funding and Financing; and
- Meetings, Incentives, Conferences, and Exhibitions (MICE).

The services offered would aim to foster relationships between the City and the foreign business and diplomatic community.

Talent Attraction

Tool-Kit

Talent attraction has become a paramount component in economic development. Cities the world over are competing to captivate and retain the attention of the best and brightest, as well as attract talent from other global jurisdictions. This has become particularly important as the "baby boomer" population begins to leave the workforce resulting in anticipated slow growth in the labour force.

Moreover, in today's knowledge-based economy, attracting highly skilled talent is essential to innovation and productivity – both drivers of economic growth.

While some talent attraction will occur naturally, cities must undertake concerted efforts to ensure they employ proper tools and programs to retain and match the right talent.

It is estimated that the senior population will more than double between 2011 and 2031, ultimately resulting in more than one in five people being over 65 years old.¹³ This means the City will have to work hard to retain talent to ensure that Ottawa's key growth sectors have the resources they require to grow and innovate.

In partnerships with economic development stakeholders such as Invest Ottawa, Ottawa Tourism and Ottawa's post-secondary institutions, the City would contribute to the development of a Talent Attraction Tool-Kit, providing Ottawa's private sector and executive search firms with common messaging and marketing for talent attraction. The tool-kit would include items like brochures, photos, testimonials, infographics, fact books, and videos, all communicating that Ottawa is a world class city for work, play and quality of life.

Student Attraction and Retention

Student attraction and retention is important in ensuring that Ottawa continues to attract an educated and talented workforce.

To this end, the City would facilitate collaborations between the private sector and Ottawa's academic institutions in the international recruitment of students as it relates to anticipated workforce requirements and needs. Once students have chosen to study in Ottawa, the City would facilitate deep community and business linkages for international students studying in Ottawa to ensure that all efforts are made to retain the talent to work and live in Ottawa upon graduation.

Education Summit

In 2016, the City would host a summit on Education and the Economy as a means to explore potential collaboration opportunities between the City, Invest Ottawa, the Innovation Centre, Ottawa post-secondary and research institutions, and the private sector.

The purpose of the summit would be to explore and address common issues and trends such as furthering collaboration on talent development and attraction, research and development, innovation, and leveraging academic institutions and economic growth.

Music Industry Support

In the 2013-2018 Council-approved Action Plan for Arts, Heritage and Culture, there is an action for Cultural Services to develop cultural industries in collaboration with the Economic Development and Innovation Department.

Through cultural resource mapping and preliminary research, Cultural Services determined that though Ottawa's music industry is robust with business activity, it could benefit from City support to further expand and grow.

Over the course of *Partnerships for Innovation*, Economic Development and Innovation would support, and work in collaboration with, Cultural Services to identify and implement industry support initiatives.

As a first step, Economic Development and Innovation would work with Cultural Services to help develop a shared commitment to action among local music industry leaders that the City would sign in order to formalize its commitment to supporting and growing the industry in Ottawa.

Kanata Technology Hub

Kanata is Ottawa's established technology hub and has been coined by many as Silicon Valley North. This vibrant and unique area of Ottawa is home to approximately 500 creative, innovative, and leading edge companies ranging from local start-ups to Fortune 500 companies. With a dense concentration of companies within a few square kilometres, Kanata is an epicentre of innovation providing close to 21,000 jobs for the city's highly educated and talented workforce. The area is also home to a strong supporting eco-system of business services and retail options.

Most recently, Kanata has seen growth in companies such as Cisco and Ciena, who have increased employment opportunities for Ottawa. Additionally, other organizations like CENGN and L-Spark have chosen to call Kanata home.

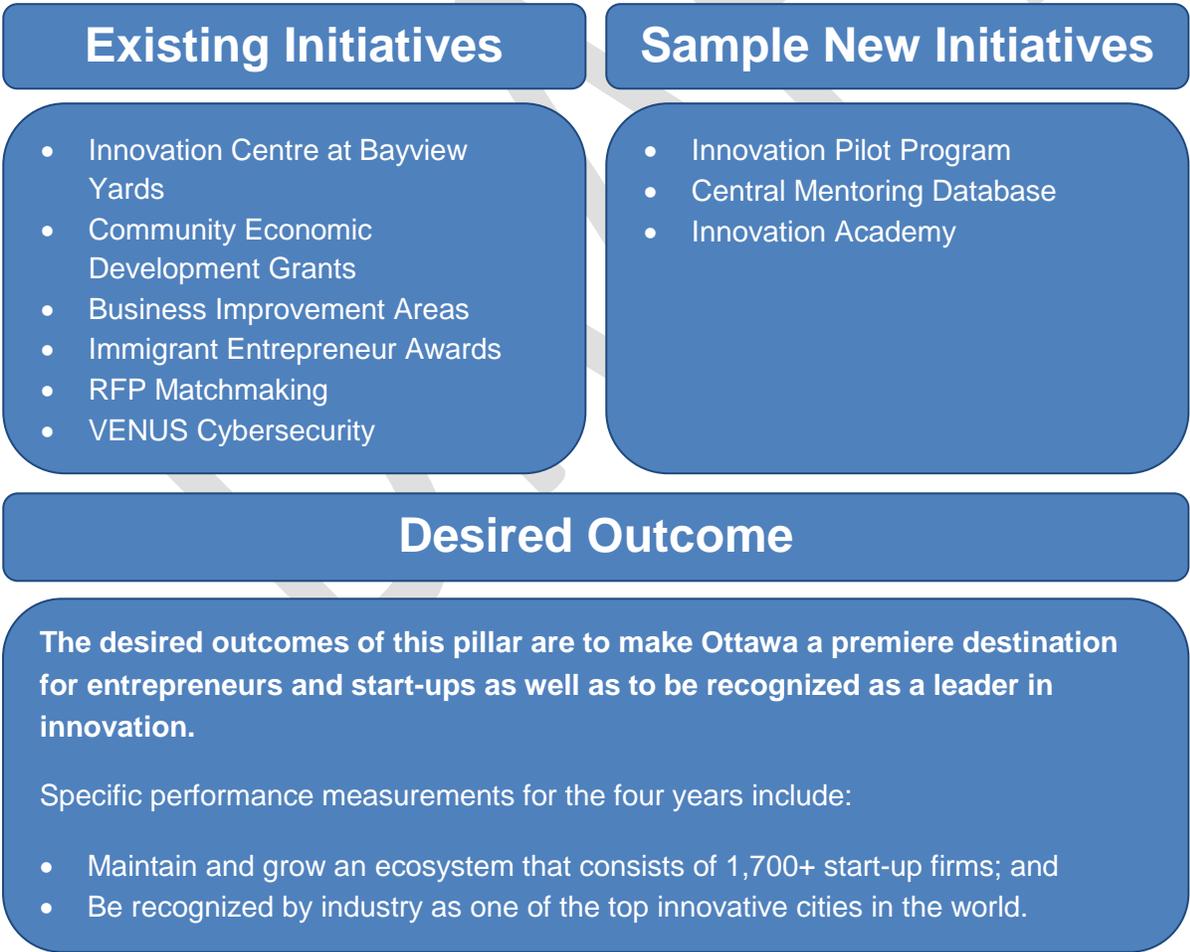
In partnership with Invest Ottawa, the Kanata North Business Improvement Area (KNBIA), the Ottawa Chamber of Commerce, and the West Ottawa Board of Trade, the Economic Development and Innovation Department would work to leverage and promote Kanata as part of the City's investment attraction and business retention and expansion efforts within Ottawa's knowledge-based sectors.

Pillar 2: Entrepreneurship

Entrepreneurship and innovation greatly contribute to economic prosperity and are thought to be some of the principle factors in sustaining long-term growth. Cities that strive for innovation often outperform their competitors. Because of this, municipalities are taking an active role in encouraging entrepreneurship and innovation.

Most entrepreneurs do not have the capital, facilities, or expertise to fully succeed on their own. Municipal support, whether through infrastructure or support programs, offers entrepreneurs tools to succeed.

While Ottawa has many of the ingredients for entrepreneurs to excel, in particular a highly educated workforce, programs offered by the City and Invest Ottawa should continue to focus on a variety of skills required for commercialization, sales, and marketing.



To successfully deliver the above initiatives, the City would work collaboratively with a variety of external stakeholders including Invest Ottawa, Ottawa's post-secondary institutions, FedDev Ontario, the National Research Council, the National Capital Commission, the Province of Ontario including the Ministry of Economic Development, Employment and Infrastructure and the Ministry of Research and Innovation, the Ottawa Chamber of Commerce, the Orléans Chamber of Commerce, the West Ottawa Board of Trade, the Ottawa Community Loan Fund, TiEOttawa, Hub Ottawa, Ontario Centres of Excellence, VENUS Cybersecurity and BIAs.

Internally, these initiatives would be delivered in cooperation with the Finance Department, Planning and Growth Management, Legal Services, the Real Estate Partnership Office, Community and Social Services, and Corporate Communications.

Internal strategies and plans related to this pillar include the City's Strategic Plan, the Official Plan, and the Municipal Immigration Strategy.

Externally, related plans include Invest Ottawa's Strategic Plan.

EXISTING INITIATIVES

Innovation Centre at Bayview Yards

Infrastructure is an important component in a City's quest to encourage entrepreneurship and foster innovation. A common physical space that satisfies this requirement as well as inspires and supports innovation and entrepreneurs creates an environment of collaboration and cooperation through a one-stop-shop approach for all participants within the innovation sphere. They include innovators, academics, suppliers, and community members who will have a dedicated space to congregate.

Ottawa's investment in infrastructure that supports entrepreneurs and innovators is a response to the City's challenge of diversifying the economy, increasing economic growth and attracting and retaining the necessary talent and companies that will improve the city's productivity.

Acting as a focal point for innovation and entrepreneurship, the Innovation Centre at Bayview Yards will showcase Ottawa's innovation and commercialization success, highlighting our post-secondary institutions, research and development infrastructure, and successful business enterprises.

Over the next year-and-a-half, the Innovation Centre renovation will be completed and occupied by early-stage companies, more mature anchor businesses, incubation and

acceleration organizations, business service agencies, post-secondary institutions, and private sector professional service businesses.

The Innovation Centre will oversee programs to build collaboration among tenants, to represent the tenants and the Ottawa entrepreneurial community to governments, local stakeholders, and the international entrepreneurial community; to manage the property, including the development of the second phase – a proposed 12-storey 180,000-square-foot tower contiguous with the Phase 1 renovated building. Invest Ottawa will be the anchor tenant and business service agency in the building.

As part of the City's in-kind contribution, which will match the Province's \$15-million contribution, a form of municipal financial incentives will be applied to the Centre above and beyond land already donated. Financial incentives would come in the form of tax breaks through either a designated Community Improvement Plan (CIP) or the establishment of a Municipal Capital Facility. City staff would evaluate the applicability of both programs to the Innovation Centre and recommend to Council that the City proceed with one of the two options.

Community Economic Development Grants

The Economic Development and Innovation Department manages the Community Economic Development (CED) Grant Program. The program's goal is to support projects that support the community's economic prospects including job creation, economic diversity, entrepreneurship and small business development, tourism, and skills development. The program would continue to be delivered over the course of *Partnerships for Innovation* with additional evaluation criteria focused on projects that advance and foster innovation.

Business Improvement Areas

There are currently 18 Business Improvement Areas (BIAs) in Ottawa. BIAs come into existence when local businesses and property owners join together to improve, promote and undertake projects that result in a stronger and more competitive commercial main street or business district. Through the Economic Development and Innovation Department, the City supports BIAs in a variety of ways, including BIA formation and expansion assistance, and the delivery of training and information sessions. Additionally, two BIA funding programs, which include the BIA Research Funding Program and the Mural and Architectural Design Feature Funding Program, are administered.

Following the dissolution of the City's Business Advisory Committee in 2012, the volunteer-based Ottawa Council of Business Improvement Areas (OCOBIA) was formed to represent all BIAs and serve as a mechanism to liaise with City Council and staff on issues impacting businesses in Ottawa. The development of OCOBIA has been highly beneficial in advancing a positive relationship between the City and BIAs.

Over the course of *Partnerships for Innovation*, the Economic Development and Innovation Department would continue to advance, address and facilitate the resolution of municipally related issues for OCOBIA. This would include playing a significant role in championing the role of BIAs to other City departments and bridging any existing gaps.

The Department would also assist OCOBIA in developing collaborative relationships with economic development stakeholders such as Invest Ottawa and Ottawa Tourism in addition to fostering relationships with other industries such as film and television, music and technology.

Furthermore, the City would continue to actively support BIAs in their pursuit of area-specific promotion and improvement. Coordination of regular meetings between OCOBIA, the Mayor, City Council and staff will also continue.

In addition to existing programs and the above support, the following initiatives would also be explored and implemented:

- Educational sessions for BIAs to learn current information on City initiatives, as well as best practices in governance, place branding, marketing, innovating public spaces, and supporting small businesses;
- Support OCOBIA in its endeavours to be a Term of Council Priority with the aim to improve how City departments liaise with BIAs and to smooth processes and procedures;
- Expanding the RFP Matchmaking and Innovation Pilot Program to BIAs;
- In partnerships with Ottawa Tourism, coordinate and facilitate the feasibility of creating tourism districts;
- Creation of a Quarterly BIA Snapshot report detailing BIA performance metrics and important trends; and
- White paper or research report on Ottawa's Retail Sector.

Immigrant Entrepreneur Awards

In partnership with an external service provider, the City has hosted the Annual Immigrant Entrepreneur Awards for the past three years. The event recognizes the

business success of those born outside of Canada and now living in Ottawa, for their contributions to the city's economy. The event has grown in size and profile and would continue to highlight and encourage entrepreneurship as a means of employment and prosperity.

Request for Proposal Matchmaking

The Economic Development and Innovation Department supplies Invest Ottawa with new procurement opportunities through a compilation service of public sector Request for Proposals (RFP) on a monthly basis. The RFPs and bids are organized by Invest Ottawa's strategic sectors and are promoted through the organization's newsletter. These bid opportunities help Ottawa-based businesses look outside of our city to compete nationally and internationally. The website receives hundreds of views each month and is of great service to local businesses. Economic Development and Innovation would continue to provide this service over the course of *Partnerships for Innovation* and would aim to expand bid reporting to countries with which Canada has trade agreements. Additionally, this service would be expanded to sectors that apply and appeal to Ottawa's BIAs.

VENUS Cybersecurity

VENUS (Virtual Environment for Networks of Ubiquitous Security) is a not-for-profit organization created in partnership with Carleton University, TELUS, Communications Security Establishment Canada, City of Ottawa, National Research Council, and the Ontario Centres of Excellence with the purpose of making Canada a leader in cybersecurity – an increasingly critical capability and growing industrial sector.

VENUS provides its members with the people, space and infrastructure to work on complex, leading-edge cybersecurity problems affecting individuals, businesses and governments throughout the world, and aims to support sector entrepreneurs and create high-quality knowledge-based jobs.

The Economic Development and Innovation Department will continue to support VENUS over the next four years, particularly as it pertains to developing strategic partnerships with other knowledge-based hubs such as The Hague Security Delta.

SAMPLE NEW INITIATIVES

Innovation Pilot Program

Invest Ottawa currently offers a number of support programs and services that provide entrepreneurs with the required tools to start a successful business.

Nonetheless, the implementation of new programs could augment Invest Ottawa's services and address untapped areas in Ottawa's economic development ecosystem. This includes the creation of an Innovation Pilot Program.

Much of Ottawa's economic success is dependent on SMEs expanding operations in and into Ottawa, increasing sales, and hiring skilled talent. To propel the success of these businesses, the City would encourage innovation by providing support in the form of a pilot program for goods and services that have yet to be commercialized.

Every year the City receives numerous requests from start-ups to pilot their goods and services. In response to this clear demand, the City would create a formal program to handle these requests in a systematic manner. Due to the City's diverse range of business lines, it is well positioned to pilot a variety of goods and services, providing opportunities to many SMEs. The City would cover some fit-up costs for the pilot project, while City staff – subject matter experts in various departments – would provide invaluable feedback to the businesses and entrepreneurs once the pilot project is complete.

To develop this program, the Economic Development and Innovation Department would work closely with Invest Ottawa, the City's Chief Information Officer and Supply Branch to ensure both the needs of entrepreneurs and SMEs are met, all while adhering to procurement and purchasing regulations. For goods or services that align better to the private sector, the Economic Development and Innovation Department would work with other stakeholders, such as BIAs, to facilitate the exploration of pilot project opportunities outside the City.

Ottawa is competing against other cities to attract more talent and the best and brightest companies. Many other cities and levels of government have already instituted their own cutting-edge pilot project programs.

For example, in New York City there is a Pilot Health Tech program that pilots innovative pilot projects in the health sector. Additionally, both Philadelphia and Boston pilot technologies to improve municipal services.

In Canada, at the federal level, the Build in Canada Innovation Program was developed to help test late stage innovative goods and services within federal government departments.

A City of Ottawa pilot project program would allow Ottawa to globally compete against other cities and provide a service tailored to local businesses and entrepreneurs in their home market.

Central Mentoring Database

A healthy economic development eco-system ensures that entrepreneurs and young talent have access to quality and skilled mentors.

Currently, many of the City's partners in economic development deliver a variety of mentorship programs that meet the different needs of local entrepreneurs and start-ups. Many of these programs have comprehensive databases containing lists of both mentors and mentees.

In an effort to avoid duplication of effort and to offer an innovative and centralized approach to matching mentors and mentees, *Partnerships for Innovation* proposes to create a central online mentoring database, which would serve to connect the many databases that already exist into one easily accessible place.

Innovation Academy

Canada is respected around the world as a public sector leader. For example, the International Monetary Fund and many other organizations have recognized Canada as having a strong and sound regulatory banking system.

Given that the public sector is a large component of Ottawa's economy, there is a high concentration of public sector subject matter experts in the city.

In an effort to harness this talent and learn from the best and brightest, this strategy proposes facilitating the creation of an Innovation Academy; an educational platform that would bring together Ottawa's post-secondary institutions to educate governments around the world on public sector excellence and innovation.

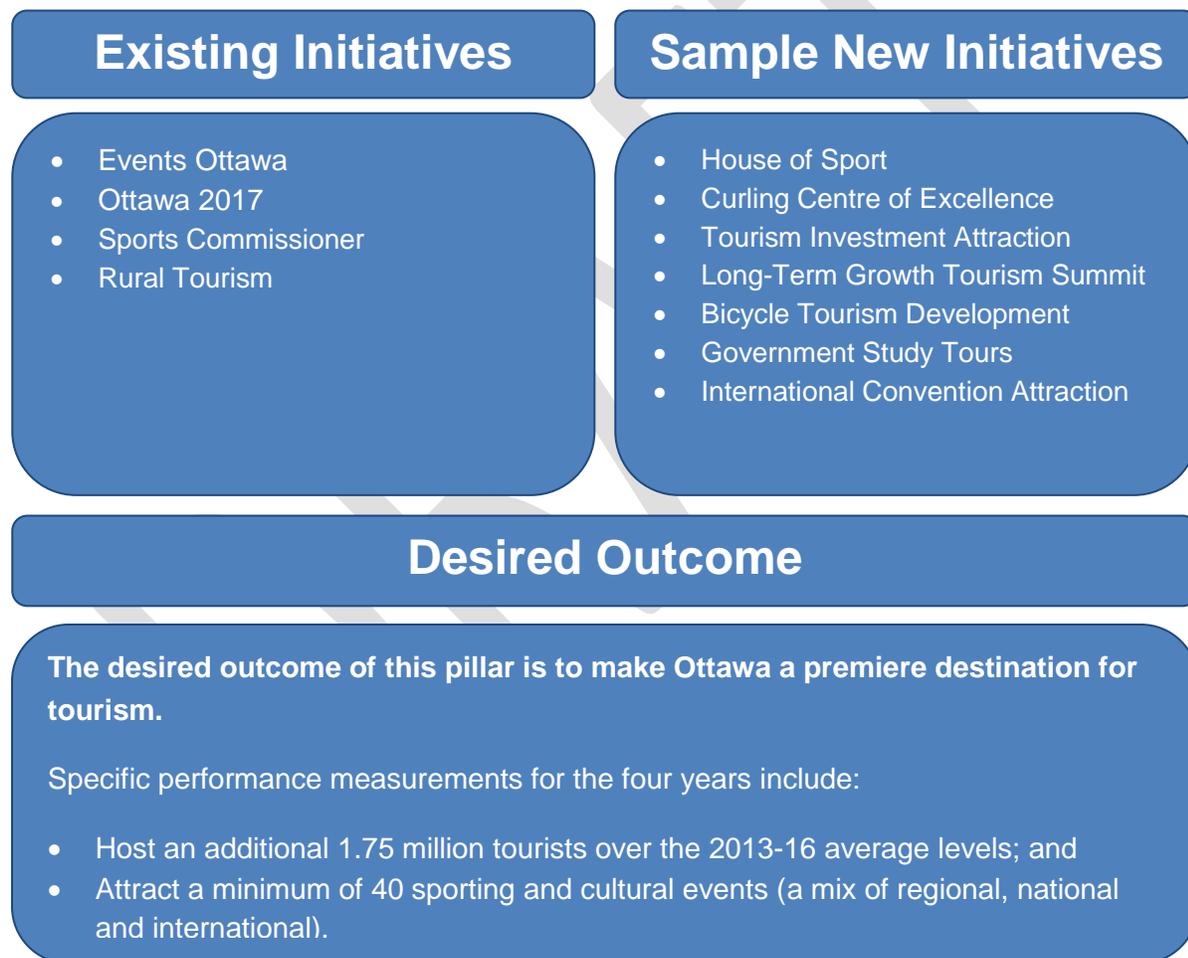
This initiative provides Ottawa the opportunity to leverage and capitalize upon the strengths inherent in being a government city and G7 capital.

Similar successful variations of such programs exist in cities like Philadelphia and Phoenix.

Pillar 3: Tourism Development

By virtue of being a capital city, Ottawa is home to a number of tourism assets including national museums, monuments, Parliament Hill and the Rideau Canal, to name a few.

To expand Ottawa’s tourism offerings and visitor experience, tourism development efforts would be increased with the purpose of attracting more visitors and tourism spending to the City. Investment in tourism development would ensure that tourism remains an important industry and will further advance Ottawa’s brand and profile as not just a government city, but one that is alive with culture and events.



To successfully deliver the above initiatives, the City would work collaboratively with a variety of external stakeholders including Ottawa Tourism, the Ottawa-Gatineau Hotel Association, the Shaw Centre, the EY Centre, the Senators Sports and Entertainment Group, the Ottawa Sports and Entertainment Group (OSEG), the Ottawa International Airport Authority, the Ministry of Tourism, Culture and Sport, various federal government

departments, the National Capital Commission, the Ottawa Chamber of Commerce, the Orléans Chamber of Commerce, the West Ottawa Board of Trade, and BIAs.

Internally, these initiatives would be delivered in cooperation with the Finance Department, Planning and Growth Management, Legal Services, Real Estate Partnership Office, Parks and Recreation, By-Law Services and Corporate Communications.

Internal strategies and plans related to this pillar include the City's Strategic Plan and the Official Plan. Externally related strategies and plans include Ottawa Tourism's Strategy and the Airport Master Plan.

EXISTING INITIATIVES

Events Ottawa

One of the key successes of *Partnerships for Prosperity* was the establishment of Events Ottawa, an office of Ottawa Tourism, dedicated to attracting large-scale sporting and cultural events to Ottawa.

Through its mandate of "Bid More, Win More, Host More," Events Ottawa has secured numerous high-profile events over the past few years including the 2013 Women's World Hockey Championships, the 2013 Duathlon Championships, the 2014 Comedy Awards and the 2014 Canadian Gymnastics Championships.

The economic impact of these events has been significant for the city's tourism industry, generating millions of dollars in visitor spending. Additionally, the exposure provided to Ottawa as event host has been invaluable.

The tremendous success of Events Ottawa was nationally recognized by the Canadian Sport Tourism Alliance who awarded them the Sport Tourism Organization of the Year Award in 2013.

Over the course of *Partnerships for Innovation*, Events Ottawa will continue to fulfill its mandate and build on its success. Upcoming events will include the 2015 FIFA Women's World Cup, the 2016 Tim Hortons Brier, the Canadian Video Game Awards in 2017, and the 2017 and 2018 Canadian Track and Field Championships.

Ottawa 2017

One of the proposed actions of *Partnerships for Prosperity* was to develop celebratory plans for Canada's 150th anniversary of Confederation, making Ottawa the country's epicentre for celebrations.

Through the creation of Ottawa 2017, the City has begun to set the stage and position Ottawa as the place for all Canadians to celebrate the nation's 150th anniversary.

Over the next two years, Ottawa 2017 will be working hard to create and deliver a comprehensive portfolio of legacy projects and a variety of large-scale events and attractions that will provide a unique celebratory experience to residents and visitors as well as sustainable economic benefits for the City throughout 2017. By creating a well balanced offering between cultural, sporting, social and business events in all areas of the City, including rural areas, the City's ambitious goal is to increase the influx of tourists coming to Ottawa in 2017 by 1.75 million (over the average level of tourist visitation of 2013- 2016).

Extensive best practice research has been conducted on other significant anniversary celebrations in Canadian cities including Quebec 400 and Prince Edward Island 2014.

Sports Commissioner

Councillor Jody Mitic has been appointed by City Council to serve as a Sports Commissioner.

The Councillor's role will include representing the City on large-scale sporting bid attraction efforts undertaken in partnership with Ottawa Tourism.

Rural Tourism

Rural Tourism is important to Ottawa. The city is surrounded by a variety of rural areas that add to and enhance Ottawa's tourism offerings.

Ottawa Tourism has a Rural Tourism Committee that meets approximately six times a year. Over the past two years, rural tourism efforts have focused efforts on increasing traffic to the Capital Country Drives website which was created to encourage visitors to Ottawa, or people travelling through Ottawa, to experience the rural countryside and all it has to offer.

Most recently, Ottawa Tourism has been exploring opportunities around rural golf tourism, with an emphasis on potentially developing golf packages.

In addition to Ottawa Tourism's initiatives, the Economic Development and Innovation Department supports additional rural initiatives and organizations such as Ottawa's Countryside.

Over the course of *Partnerships for Innovation*, the Economic Development and Innovation Department would continue to collaborate with Ottawa Tourism to advance rural tourism efforts.

SAMPLE NEW INITIATIVES

House of Sport

A House of Sport, as a general concept, is a collection of sport federations and associated organizations and companies that have adjacent office space contained in one building – the “house.” Similar to an entrepreneur incubator, the basic premise of a house of sport is that all of the tenant organizations can benefit from the sharing of costs and the development of business and communications networks. In turn, the city benefits from having organizations that provide economic vitality, host events and meetings, and recruit and retain creative and professional talent.

The concept of developing a House of Sport in Ottawa is both a major event and a tourism enhancement opportunity.

Given that there is already a considerable amount of activity related to sport in Ottawa, a House of Sport would provide a physical focal point for all of these activities, and it would be a tangible, visible location where further development and innovation related to sport could take place. Everything connected with sport in Ottawa could have its locus at the House of Sport, giving new focus to the activities and providing a tangible setting to showcase and promote Ottawa's investment in, and commitment to, sport from the grassroots to elite levels.

In addition to a new physical representation of sport in Ottawa, a House of Sport would also provide a new communication platform. Ottawa has been successful as a sports city, but the narrative of Ottawa as a sports city too often leads back to a handful of successful events. In order to refresh and maintain the narrative, a House of Sport would allow Ottawa to reach out to the industry with a forward-looking project that encapsulates Ottawa's strong achievements and highlights that Ottawa is continuing to move forward. Such a narrative would assist Ottawa in maintaining its competitive edge relative to other cities and assist it in its bids for future major sports events.

There is currently considerable focus from the sports world on Canada, with international sports leaders expressing great confidence in events conducted in all of the country's major cities. Ottawa can benefit from this positive focus on Canada, reminding the industry that Ottawa has been, and continues to be, an important city for high-level competitive sport.

The Ottawa sports hub is already substantially developed and has much to offer. Clearly, the knowledge, experience and facilities in Ottawa make for a very attractive proposition. The success of other industry clusters in Ottawa can also show that Ottawa can be sold as an attractive place to live, work and play. Ottawa has an appealing product to take to the market, and its association with other previous and current economic development successes in the city can be viewed as very positive.

The House of Sport concept is modelled after the Maison du Sport International located in Lausanne, Switzerland. The "Maison" is home to a number of international sports federations and leading players in international sports administration, including the Association of Summer Olympic International Federations.

Economic Development and Innovation would work with Ottawa Tourism to facilitate the development of a House of Sport.

Curling Centre of Excellence

The Canadian Curling Association (CCA) is examining the feasibility of consolidating all of its operations in one location. The vision of the CCA is to build a facility that would be the international centre of curling: the Canadian Curling Centre of Excellence.

The Centre would be the first of its kind for curling, housing the administrative arm of the organization, boasting a curling arena capable of hosting national and international events, conducting research and development, and featuring a tribute centre with memorabilia that is awe-inspiring to visitors, sponsors, and athletes alike.

Recognizing that sport tourism is a significant sector of the tourism economy, and that a critical component of many successful sporting event bids has been the ability of Ottawa Tourism to liaise with national sports organizations located in Ottawa, Economic Development and Innovation and Ottawa Tourism would work with the CCA to collaborate in determining size requirements of the facility, estimating the economic impact to Ottawa should such a facility be constructed, exploring location options, and examining what role the City could play in developing the Centre with the CCA.

Tourism Investment Attraction

Because of the existence of federal tourism assets in Ottawa, the City has never taken an overly proactive role in developing new tourism attractions. Given the federal government's reduction in spending, it does not seem likely that new tourism destinations will be created at the federal level in the foreseeable future.

This means that the growth of the sector rests predominantly on the shoulders of the City, Ottawa Tourism, BIAs and other economic development stakeholders. This presents the opportunity to partner on innovative initiatives that foster the creation of new tourism assets.

In partnership with Ottawa Tourism, BIAs, and other economic development stakeholders, the City would implement a plan to attract large-scale retailers and major entertainment attractions and tourism facilities to all areas of the city, including rural Ottawa. This would attract additional visitors, provide reasons to lengthen visits and thus increase tourism spending, ultimately creating employment and enhancing economic viability.

The work would begin with background market and economic research that is needed to advance a market-based entertainment and attraction program for the City. Collateral material based on the market research would be developed in preparation for going out to the marketplace and designed specifically to be married with a pitch to carefully chosen companies, retailers, and attractions.

Long-Term Growth Tourism Summit

Once Ottawa 2017 celebrations have concluded, it is important that the city continues to ride the momentum and capitalize on the national and international exposure of that year.

To explore opportunities for long-term growth, the City, in partnership with Ottawa Tourism and other stakeholders, would facilitate a tourism summit. With the participation of key organizations such as the Ottawa International Airport, Ottawa's convention centres, OGHA, and BIAs, this summit would propose and identify strategies and initiatives that would increase Ottawa's tourism offerings and encourage new segments of visitors to the city. This initiative would work in tandem with the Tourism Investment Attraction efforts.

Bicycle Tourism

Bicycle tourism is emerging as a growing sector of the tourism market. It is estimated that 10 per cent¹⁴ of Canadian adults cycle while on a trip, and Ottawa ranks second among the top four destinations for Canadian cycle tourists, with 110,000 cyclists visiting Ottawa in 2010¹⁵.

In 2010, two million Canadian visitors participated in cycling activities while travelling in Ontario, an increase of 25 per cent from 2009¹⁶. Close to \$391 million was spent by these Canadian cycle tourists in Ontario, an increase of 18 per cent from 2009¹⁷. In a recent case study, it was found that cycle tourists staying one or more nights in the Niagara Region spent on average \$148 per stay, excluding accommodation, with 61 per cent spent on food and beverages¹⁸.

Last year, the City of Ottawa's Planning and Growth Management Department forged a partnership with Ontario By Bike, a non-profit organization dedicated to fostering sustainable mobility and tourism solutions across Ontario, to hold workshops for the hospitality and commercial sectors on how to be certified as bike-friendly, as well as to develop a promotional website for Ottawa. As a result of this collaboration, 37 locations in the city have been certified as bike-friendly and Wellington West BIA was designated as the first bicycle-friendly business area in Ontario.

From 2015 to 2018, Economic Development and Innovation would work with local cycling organizations, cycling merchants, bike-friendly businesses, BIAs, OGHA, the Ottawa International Airport and Ottawa Tourism, and other City departments to:

- Further strengthen the bicycle-friendly network and determine opportunities for cross promotion;
- Work collaboratively on way-finding and cycling routes;
- Market bicycle tourism in conjunction with the Confederation Line; and
- Conduct focused market research to better determine where bicycle tourists to Ottawa are coming from, where they are staying and where they are spending their money.

Government Study Tour Program

One area which the City has yet to facilitate and promote is that of study tours. With a wide range of leading-edge government programming in place within federal departments, agencies and many local not-for-profit agencies, as well as many leading

private sector companies, Ottawa is well aligned to share its wealth of knowledge and expertise with the international community.

While many study tours visit the city annually, there is no formal program in place to provide a dedicated service to assist in facilitating and coordinating these tours. Moreover, there is currently no concerted effort to actively attract tours to the city.

To address this gap, the City would create a program to facilitate best practices sharing through a formal study tour program in Ottawa. This service would allow national and international delegations to choose from a variety of subject matter experts based in the nation's capital and provide logistical support in organizing tours.

By providing this service, Ottawa would benefit from enhancing its reputation as a leading-edge city and promoting the best of Ottawa. At the same time, this program would boost tourism outcomes by increasing inbound international visitors and enhancing Ottawa's international profile.

Support International Convention Attraction

Over the next four years, the City would continue to support the efforts of Ottawa's convention centres. Together, both the Shaw Centre and the EY Centre have an economic impact of millions of dollars spread across the city's hotels, restaurants, retail sector and transportation. Leveraging resources to advance activities of the city's convention centres will increase economic impacts and the number of visitors to the city.

Similar to the City's partnership with Ottawa Tourism in major event attraction, the City would work with Ottawa's convention centres to dedicate a partial resource to assist efforts in attracting large scale international conventions to the city. This would contribute additional corporate tourism and economic impacts for the city and bolster Ottawa's reputation as a premiere destination for knowledge-based innovation.

Additionally, leading up to Ottawa 2017, the City would promote Ottawa as the place for annual conferences, business meetings and events for that year. The City would work as a facilitator, matching convention and event opportunities with Ottawa's network of facilities and hotels.

Pillar 4: Research and Information Tools

Research, information and data are critical components of successful business decisions. In today’s global and competitive marketplace, cities and businesses cannot make effective and efficient strategic decisions simply based on instinct and judgment. The availability and analysis of data assists organizations in taking calculated risks and determining strategic positioning. Companies and organizations that use data and gather competitive intelligence are better positioned to seize opportunity and increase profitability.

Over the next four years, the Economic Development and Innovation Department proposes to take a more proactive role in researching and analyzing economic development trends as well as increasing the quantity and quality of data available to businesses and economic development stakeholders for the purpose of business attraction, expansion and retention.



To successfully deliver the above initiatives, the City would work collaboratively with a variety of external stakeholders including Invest Ottawa, Ottawa's post-secondary institutions, Ottawa Tourism, Statistics Canada, the Conference Board of Canada, the Ottawa-Gatineau Hotel Association, the Shaw Centre, the EY Centre, Ottawa's Real Estate Brokers, and the Ottawa International Airport Authority.

Internally, these initiatives would be delivered in cooperation with the Research and Forecasting Group of the Planning and Growth Management Department.

Strategies and plans related to this pillar include Invest Ottawa's Strategic Plan, Ottawa Tourism's Strategy, the City's Official Plan, and Annual Development Report.

EXISTING INITIATIVES

White Papers, Economic Impact Studies and Research Reports

To be a leader in economic development and innovation, it is important that the City be at the forefront of economic development programming. The City should be leading the way in economic development best practices, developing and undertaking novel initiatives that best serve Ottawa's businesses and economic development stakeholders. For this reason, the City would continue to take a proactive role in researching and analyzing economic development opportunities.

The City's research on economic development trends and opportunities would be shared and published in the form of white papers, economic impact studies and research reports. While most of the initiatives discussed as part of the strategy have been researched and are ready for implementation, there are a handful of potential initiatives that the City would further explore through research and analysis. These initiatives would be presented in one of the above-mentioned forms.

Topics for research include Social Finance, Ottawa's Retail Sector, Place Branding, and Non-Governmental Sector Support.

Research on these potential initiatives would inform decision-makers of their feasibility, costs, and return on investment. They would also provide rationale on whether or not to proceed with implementation.

Monthly Economic Update

Over the past two years, the Economic Development and Innovation Department has issued a Monthly Economic Development Update which provides Council, senior

management, and business leaders with relevant analyses on Ottawa's economy. This publication has provided stakeholders with a desired and official review of Ottawa's economic health, highlighting the following areas of the economy: labour market, real estate, and construction. Economic Development and Innovation would continue to issue these publications and would improve and include new information, such as retail sector performance metrics, where and when necessary.

Annual Economic Outlook Event

Information provided as part of the Monthly Update is elaborated upon in the Annual Economic Outlook Event which is delivered in partnership with an external service provider. The event has been enormously successful in providing local business and economic development stakeholders with information on Ottawa's economic climate, trends and upcoming City programs and services. The delivery of this event would continue over the course of *Partnerships for Innovation*. Moving forward, new event formats and themes would be explored in an effort to keep these events informative and relevant.

Locate Ottawa

Locate Ottawa is an online GIS-based tool designed to help site selectors, property owners and real estate professionals access property information. It is an interactive mapping program that speeds up and simplifies the process of finding the optimal business locations by providing access to a range of valuable information including site-specific demographic and business analytics reports. Locate Ottawa has assisted the City, Invest Ottawa, as well as local developers and realtors in their investment attraction efforts. Over the next four years, Economic Development and Innovation would continue to offer, update and maintain Locate Ottawa.

SAMPLE NEW INITIATIVES

Quarterly Tourism Report

Similar to the Monthly Economic Development Outlook Report, a quarterly tourism report would be created to report on trends within the tourism industry. Components within the report would include information on tourists, local hotel performance, airport statistics, major sporting and cultural events, convention sales, and overall industry trends.

This report would be developed in consultation with key stakeholders such as Ottawa Tourism, the Ottawa-Gatineau Hotel Association, the Ottawa International Airport, the Shaw Centre, and the EY Centre.

Quarterly distribution of the report would be shared with those groups named above as well as all hotels, tour operators, museums, restaurants, and any other interested party. In addition, it would be provided to internal staff for decision-making processes as well as any relevant federal or provincial departments and agencies.

Quarterly Real Estate Report

Similar to the Monthly Economic Development Outlook Report and the Quarterly Tourism Report, a Quarterly Real Estate Report would also be created. The purpose of this report would be to provide an update on both Ottawa's commercial and residential real estate market. Components within this report would include such metrics as sales, average sale prices, housing starts, industry highlights, and developments.

This report would be developed in consultation with Ottawa's commercial and residential real estate community and shared with them on a quarterly basis. It would also be shared with relevant internal departments such as the Real Estate Partnership and Development Office and the Planning and Growth Management Department.

Quarterly BIA Snapshot

Similar to the above reports a Quarterly BIA Snapshot will also be created. The purpose of this publication would be to report on metrics that influence the performance and operation of Ottawa BIAs. These metrics would include relevant and specific measures on tourism, commercial real-estate, the retail sector, public parking statistics and other economic trends important to BIAs. This report will be designed in collaboration with OCOBIA.

Innovation Index

There are many indices that measure innovation on both global and national scales. Currently, there is no such index at the local level. A comprehensive understanding of a city's ability to successfully innovate is essential to economic growth.

The creation of an Innovation Index specific to Ottawa would allow the City, economic development stakeholders, and businesses to understand the innovation landscape in Ottawa and how local performance compares in Canada and around the world. When

companies understand how they perform relative to their competitors and peers, the necessity to innovate becomes clear.

Using a variety of innovative criteria, such as investments in innovation and corporate culture, the index will measure innovation in Ottawa's key sectors on an annual basis. The index will be developed in partnership with the City, Invest Ottawa and Ottawa's post-secondary institutions.

Data Partnership

In an effort to ensure the City and economic development stakeholders have access to a comprehensive set of accurate data, an informal group of research professionals would be established to share research, data, best practices and jointly undertake research projects. This group would be led by the City and would meet on a quarterly basis. Potential participants of the group would include Statistics Canada, the Conference Board of Canada, Ottawa Tourism, Invest Ottawa, the Ottawa-Gatineau Hotel Association, Ottawa's convention centres, the Ottawa Neighbourhood Study, BIA's, businesses, chambers of commerce and Ottawa's post-secondary institutions.

Knowledge-Based Research Assets and Inventory

With four post-secondary institutions, strong knowledge-based industries, and many research labs and institutions, Ottawa is a city that produces research in a number of sectors.

Research and knowledge-based innovation is an important asset in business attraction and expansion efforts and should be highlighted to businesses and organizations looking to invest or expand operations in Ottawa.

To this end and to ensure that Ottawa derives maximum value from its research and research labs and institutions, the City would actively promote, highlight, and catalogue on-going and completed research to both public and private stakeholders locally, nationally, and internally.

This effort would seek to further advance Ottawa as an innovative city with a talented and educated workforce that produces world class research.

Next Steps

Together with identified partners, the Economic Development and Innovation Department would lead and be responsible for the implementation of the initiatives outlined in *Partnerships for Innovation*.

Implementation of *Partnerships for Innovation* would be conducted over the course of the next four years, 2015 to 2018. Each year, the Economic Development and Innovation Department would seek City Council's approval, through the Economic Development Strategy Implementation Plan and Progress Report, of an annual implementation plan that outlines initiatives, including required resources and estimated timelines for that year. These annual implementation plans would also bring forward any unforeseen initiatives that may not be on the horizon at the time of writing this document.

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Appendix A: Economic Development Strategy Stakeholder Consultations

EXTERNAL STAKEHOLDERS

- Foreign Trade Offices in Ottawa
- Innovation Centre at Bayview Yards
- Invest Ottawa
- Le Regroupement des gens d'affaires (RGA)
- National Sporting Organizations
- Orléans Chamber of Commerce
- Ottawa Chamber of Commerce
- Ottawa Community Loan Fund (OCLF)
- Ottawa Council of Business Improvement Areas (OCOBIA)
- Ottawa International Airport Authority
- Ottawa Sports and Entertainment Group (OSEG)
- Ottawa Tourism
- Ottawa-Gatineau Hotel Association (OGHA)
- Various Ottawa based private sector businesses
- Various representatives from Commercial Real Estate sector
- Various representatives from Post-Secondary Institutions
- Senators Sports and Entertainment
- Shaw Centre (formerly the Ottawa Convention Centre)
- West Ottawa Board of Trade

INTERNAL STAKEHOLDERS

- Community and Social Services Department
- Infrastructure Services Department
- OC Transpo
- Ottawa Public Health
- Ottawa Public Library
- Parks, Recreation and Cultural Services Department
- Planning and Growth Management Department
- Real Estate Partnership and Development Office

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- ¹ Statistics Canada, estimates of population based on the Standard Geographical Classification (SGC) 2011
- ² The Conference Board of Canada. (Winter 2014). Metropolitan Outlook, Economic Insights in 13 Canadian Metropolitan Economies.
- ³ Statistics Canada, Labour Force Survey (LFS) custom tabulation adopted from the City of Ottawa's Annual Development Report for 2013
- ⁴ Statistics Canada, Labour Force Survey (LFS) annual averages for 2011, 2012, 2013, and 2014
- ⁵ Statistics Canada, Labour Force Survey (LFS) annual averages for 2011, 2012, 2013, and 2014
- ⁶ Invest Ottawa. (2015). *Why Ottawa?*, Retrieved from <http://investottawa.ca/why-ottawa/>
- ⁷ City of Ottawa. (n.d). *Immigration Ottawa: Starting a Business*, Retrieved from: <http://ottawa.ca/en/immigration/working-and-doing-business/starting-business>
- ⁸ The Canadian Trade Commissioner Service. (2015). *Ottawa: Where Talent Comes to Work, Play and Grow*, Retrieved from <http://www.international.gc.ca/investors-investisseurs/cities-villes/ottawa.aspx?lang=eng>
- ⁹ Ibid
- ¹⁰ Statistics Canada, estimates of population based on the Standard Geographical Classification (SGC) 2011
- ¹¹ Statistics Canada, International Travel Survey (ITS) and International Survey of Residents of Canada (TSRC) custom tabulation adopted from Ottawa Tourism's All Visitation to Canada's Capital Region 2012 report
- ¹² Ottawa Tourism, Ottawa-Gatineau Quarterly Tourism Performance Indicators for 2011, 2012, 2013 and 2014
- ¹³ City of Ottawa. (2012). *A Portrait of Ottawa Older Adults: Demographic and Socio-Economic Characteristics*, <http://ottawa.ca/calendar/ottawa/citycouncil/cpsc/2011/08-18/07%20-%20Document%203%20-%20Demographic%20and%20Socio-Economic%20Characteristics%20EN.pdf>
- ¹⁴ Travel Activities and Motivations Survey. (2006). *Canadian Outdoor Activities While on Trips: An Overview*. Retrieved from www.mtc.gov.on.ca/en/research/travel_activities/CDN_TAMS_2006_Outdoor_Activities_Overview_%20Report_Feb2008.pdf
- ¹⁵ R. Dodds, Ryerson University. (2010). The Demand for Cycle Tourism in Ontario's Greenbelt Region. Ted Rogers School of Hospitality & Tourism Management, 4th Year Tourism Research Course,
- ¹⁶ Transportation Options. (May 2012). Transportation Options with the assistance of the Ontario Ministry of Tourism, Culture and Sport. Cycle Tourism Research – 2012 Update. Source data: Statistics Canada, Travel Survey of Residents of Canada (2007–2010). This document is an update of information in "Appendix A: Cycle Tourism Research" in Rachel Dodds and Mark Singh, Potential to Move Towards an Ontario-wide cycle tourism partnership: Three year strategic plan, an internal report prepared by Sustaining Tourism for Transportation Options, November 18, 2010.
- ¹⁷ R. Dodds, Ryerson University. (2010). The Demand for Cycle Tourism in Ontario's Greenbelt Region. Ted Rogers School of Hospitality & Tourism Management, 4th Year Tourism Research Course
- ¹⁸ Travel Activities and Motivations Survey. (2006). *Canadian Outdoor Activities While on Trips: An Overview*. Retrieved from www.mtc.gov.on.ca/en/research/travel_activities/CDN_TAMS_2006_Outdoor_Activities_Overview_%20Report_Feb2008.pdf