January 7th, 2016

Re: Your request for access to information under Part II of the Access to Information and Protection of Privacy Act, our file #BTCRD-43-2015

This is to confirm that on December 16th, 2015 the Department of Business, Tourism, Culture and Rural Development received your request for access to the following records/information:

“All Briefing books, emails, notes, and correspondence prepared for incoming Minister.”

I am pleased to inform you that a decision has been made by Alastair O'Reilly, Deputy Minister for the Department of Business, Tourism, Culture and Rural Development to provide access to the requested information. Only 2 bullet list items within the records have been severed in accordance with Sections 34 of the Access to Information and Protection of Privacy Act, disclosure harmful to intergovernmental relations or negotiations.

In accordance with your request for a copy of the records, the appropriate copies have been enclosed.

Please be advised that you may ask the Information and Privacy Commissioner to review the processing of your access request, as set out in section 42 of the Access to Information and Protection of Privacy Act (the Act). A request to the Commissioner must be made in writing within 15 business days of the date of this letter or within a longer period that may be allowed by the Commissioner.

The address and contact information of the Information and Privacy Commissioner is as follows:

Office of the Information and Privacy Commissioner
2 Canada Drive
P. O. Box 13004, Stn. A
St. John’s, NL. A1B 3V8

Telephone: (709) 729-6309
Toll-Free: 1-877-729-6309
Facsimile: (709) 729-6500

P.O. Box 8700, St. John's, NL, Canada A1B 4J6  t 709.729.7000  f 709.729.4858
You may also appeal directly to the Supreme Court Trial Division within 15 business days after you receive the decision of the public body, pursuant to section 52 of the Act.

Please be advised that responsive records will be published following a 72 hour period after the response is sent electronically to you or five business days in the case where records are mailed to you. It is the goal to have the responsive records posted to the Office of Public Engagement's website within one business day following the applicable period of time. Please note that requests for personal information will not be posted online.

If you have any further questions, please feel free to contact me by e-mail at JonathanHammond@gov.nl.ca.

Sincerely,

Jonathan Hammond
ATIPP Coordinator
Department of Business, Tourism, Culture and Rural Development
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The Department of Business, Tourism, Culture and Rural Development (BTCRD) is:

- the lead for the economic, culture, and innovation agenda of the Provincial Government.

- provides insight, intelligence, innovation, and investment services for businesses and communities to create a strong, vibrant business community and regional economies.

- responsible for export development and Foreign Direct Investment.

- one of the province's largest operators of tourism, culture and heritage facilities, many of which are located in rural areas of the province.
BCTRD Evolution

- IBRD R&D Support Programs moved to RDC in 2009
- IBRD merged with Dept. Business in 2012
- Programs merged and structural changes as part of CMA in 2013
- Tourism and Culture merged with IBRD in the fall of 2014 creating current Department

Business, Tourism, Culture and Rural Development
The department’s mandate is to lead:

- creation and maintenance of a competitive economic environment leading to long-term sustainable employment opportunities;

- the diversification of the economy, with particular attention to rural areas;

- marketing the province as a tourism destination and work with industry to identify opportunities;

- promoting, protecting and preserving the province’s arts, culture and heritage;

- organize events and activities honouring the sacrifice of Newfoundland and Labrador’s veterans;
increased trade and export of goods and services;

creation of a climate conducive to innovation in business through the facilitation of R&D, tech transfer and commercialization;

provision of business information, counseling and financial support programs, and services;

negotiation and administration of economic development agreements and other forms of collaboration;

strategic approach to growth of the ocean technology sector; and,

identify and pursue opportunities in the Arctic, and position NL as a leader in Arctic-related activities.
Legislation

Responsible for administering the following provincial legislation:
- Economic Diversification and Growth Enterprises Act
- Business Investment Corporation Act
- Historic Resources Act and Paleontological Regulations
- Rooms Act
- Colonial Building Act
- Arts Council Act
- Books Preservation of Copies Act
- Tourist Establishments Act
- Innkeepers Act
- Pedestrian Trails Liability Protection Act
- Cruiseship Authority Act
- Grand Concourse Authority Act
Entities Reporting to the Minister

Category One
- The Rooms Corporation (The Rooms – 75 employees)
- Research and Development Corporation (RDC – 37 employees)

Category Two
- NL Film Development Corporation (NLFDC – 5 employees)
- Marble Mountain Development Corporation (MMDC – 8 permanent and 100 seasonal staff)

Category Three
- NL Arts Council (NLAC – 7 employees)
- Heritage Foundation of NL (HFNPL – 4 employees)
- Provincial Historic Commemorations Board (PHCB)
- Newfoundland Hardwoods Ltd
- Newfoundland Oceans Enterprises Corporation (NOEL)
- Business Investment Corporation (BIC)
- Economic Diversification and Growth Enterprises (EDGE)
- Newfoundland and Labrador Immigrant Investor Fund Limited (NLIIFL)

Business, Tourism, Culture and Rural Development
BTCD Structure

Deputy Minister (Alastair O'Rielly)
- 5 Assistant Deputy Ministers
  Regional and Business Development (Rita Malone)
  Trade and Investment (Daryl Genge)
  Innovation & Sector Development (Mark Ploughman)
  Ocean Technology and Arctic Opportunities (Brian Burke)
  Tourism and Culture (Carmela Murphy)
- Communications Division
- Policy & Strategic Planning Division
Department has a staff complement of 233 permanent, temporary and contractual core government employees.

- approximately 140 casual employees that work as needed at the Arts and Culture Centres.

- 44 seasonal employees for the Visitor Information Centers and historic sites throughout the province.
Staff

- 96 staff throughout the province
  - 9 Directors
  - 55 EDO's
- Regional Operations
  - 5 Regional Offices
  - 15 field Offices
- Regional Economic Planning and Development
- Business Analysis
- Portfolio Management - Marystown

Regional and Business Development Branch
The Branch facilitates diversification of the economy on a provincial and regional basis, with particular attention to rural areas.

- Regional objectives are targeted at assessing and prioritizing growth opportunities and identifying critical economic infrastructure investments, capacity enhancement, and market and export development needed for regional and sector growth.
- Focuses on the development and implementation of activities that lead to enhanced or new business opportunities, including investing in business start-ups and expansions.

Funding support is provided to clients and businesses to support activities such as:
- Marketing,
- Infrastructure enhancement,
- Sector development, and
- Research as well as for productivity improvements to enhance competitiveness.
Non-financial supports are driven by the goals of diversifying and strengthening regional economies by increasing the competitiveness and productivity of individual businesses. Activities include:

- Opportunity Identification
- Business Retention and Expansion (BR&E) – firm and sector level
- Sector development & value added resource industries

BTCRD offers a variety of business capacity tools including information sessions, counselling, diagnostics, market entry activities and market intelligence. BTCRD works with clients to identify their strengths, match them to growth opportunities, and support their market entry strategies.
Activities

- Financial and Non-Financial Support
- Frontline Service Delivery for All Programs and Services
- Business Counseling
- Economic Planning and Implementation Diversification and Mitigation
- Policy and Program Management
- Financial and Audit Controls
- Account Management and Collections
- Investment Attraction Support, brokering, negotiating and aftercare
- Oversight of Crown Corporations (BIC, EDGE, NOEL, NHL and NLIFL
- Financial Analysis for other departments
Funding

**Business Investment Fund (Commercial)**
- Business Development Support (Grants)
- Business Investment Support (Loans/Equity)
- Investment Attraction (FDI - Loans/Equity)

**Regional Development Fund (Non-Commercial)**
- Regional Development
- Partnership and Community Capacity Building
Trade and Investment Branch
29 positions - all located in Confederation Building
- 4 Directors

Trade Policy

International Business Development

Investment Attraction

Marketing
Mandate and Activities

To drive provincial economic growth by:
- Advancing trade and investment with national and international jurisdictions and
- Promoting our capabilities, strengths and offerings among provincial, national and international audiences.

Activities:
- Trade policy – AIT/CETA/TPP & others
- Investment attraction
- National/International Business Development & Support
- Marketing and promotions
Priority Markets
- United States
- European Union
- China/Asia
- Brazil
- Caribbean

Trade and Investment Branch
Staff

32 staff (mostly in St. John's)

Innovation and Advanced Technology
- Driving government's economic diversification agenda by supporting the start-up and expansion of firms in advanced technology sectors, growing NL's pool of innovators and entrepreneurs;
- Emphasis on maximizing commercial opportunities for firms in the aerospace and defence; ICT; and biotechnology-technology sectors; and,
- Investing to enhance value proposition and competitiveness at the firm-level, including investments that support the development and deployment of productivity-enhancing green technologies across a multitude of sectors.

Sector Development
- Develop strategies and initiatives to foster growth in strategic sectors of the economy; and
- Maximize supplier development opportunities by:
  - helping companies develop capabilities to meet procurement requirements of larger companies
  - Broker relationships/collaborations and exposing firms to opportunities

Information Management
- In compliance with the Management of Information Act, the Division develops and manages records and information management functions, the TRIM electronic records database, departmental CS3 and LAPro client information systems, IT coordination, user support and related training.
Activities

- Firm level productivity/innovation - business networks/lean/technology adoption
- ICT – digital media/maximizing participation in resource sectors
- Life Sciences – translational & personalized medicine
- Green Economy
- Aerospace and Defence – leveraging industrial benefits
- Rural Broadband – network expansion/enabling services
- Leveraging public procurement for innovation
- Crafts Industry
- Manufacturing/Lean
- Agrifoods
- Food and Beverage
- Youth innovation

Innovation and Sector Development
Staff

Staff all in Confederation Building
- 1 Director & 3 Specialists

Mandate - Ocean technology sector
- To support and promote growth in Newfoundland and Labrador's ocean technology cluster through support to business, strengthening ties between institutions and industry and marketing the sector locally, nationally and internationally

Mandate - Arctic Opportunities
- Development and implementation of the Arctic Opportunities Initiative aimed at positioning the province as the path to the Arctic and creating an environment in which local stakeholders can benefit from emerging opportunities, northern communities can thrive, and that will further attract global industry leaders

Ocean Technology and Arctic Technology Branch
Ocean Technology Sector:
- Significant world class facilities (e.g. NRC Ice tank, towing tank; MI flume tank and Centre for Marine Simulation; CCORE facilities and centrifuge etc.)
- Approximately 88 self-identified companies, with sales of well over $550M
- Updated sector profile completed in May, industry needs assessment to be completed in December, to feed into new Sector Strategy

Arctic Opportunities:
- Strategy Developed with four strategic directions
  - Positioning the province as the Path to the Arctic; Capacity Building; Economic Development and Business; R&D
- New Strategic Alliances
  - MOU signed with Nunavut in July 2015
  - Discussions ongoing with Greenland for future MOU
- Northern Lights Conference (Ottawa – Jan 27-30, 2016)
  - Key event for positioning the province, highlighting capabilities, furthering relationships (e.g. Nunavut, Greenland and Federal Government)
Tourism and Culture
Tourism and Culture Staff

284 staff permanent, seasonal and call in staff located throughout the province

Tourism:
- Tourism Research
- Tourism Marketing
- Tourism Product Development

Culture:
- Arts
- Heritage
- Arts and Culture Centres

Regional Presence
- 8 Visitor Information Centres
- 6 Arts and Culture Centres
- 12 Provincial Historic Sites

Tourism and Culture Branch
To drive tourism and economic growth by leading the implementation of *Uncommon Potential: A Vision for Newfoundland and Labrador Tourism* (Vision 2020) to double tourism spending to $1.6 billion by 2020.

**Tourism Research**
- Ensuring accessible, timely, high-quality market intelligence and research to support planning and continued growth of the tourism sector
- 2016 Exit survey

**Tourism Marketing**
- Marketing the province in priority markets in Canada, the North East USA, UK and Germany
- Integrated advertising, digital and sales plan - $13.0 million dollar budget

**Strategic Product development**
- Facilitate the development of tourism products and experiences
- Market readiness in partnership with industry
Tourism Activities

- Outfitting - non resident big game allocation plan
- Visitor Services – TODS (Signage), Visitor Information Centres (VICs) regional VIC Funding, Call Centre and material distribution
- Tourism Assurance Program (TAP)
- Accommodation Licensing – Tourist Establishment and Innkeepers Act and Regulations
- Market Readiness Support
- Season Extension Initiatives
- Product experience enhancement – i.e. food quality and service
- Destination development Planning
- Supporting 5 Destination Management Organizations (DMOs)

Tourism and Culture Branch
- **Creative Newfoundland and Labrador** – the cultural strategy for Newfoundland and Labrador encompasses Arts and Heritage sectors

- Supporting and fostering access to and development of the arts, and contributing to the capacity of cultural entities.

- Provide funding and other assistance to artists and works to support and sustain diverse cultural industries.

- Arts component of the Cultural Economic Development Program (CEDP), $1.2 million

- Publishers Assistance Program (PAP)

- Cultural Events Fund

  Arts and Letters Awards (ALA)
Culture –
Arts and Heritage

- Promoting, protecting and preserving the province’s tangible and intangible cultural heritage

- Heritage component of the Cultural Economic Development Program (CEDP) $1.3 million for operating grants and project funding for community heritage organizations and the Aboriginal Cultural Heritage Program (ACHP)

- Provincial Historic Sites
  - 19 designated sites (3 shipwrecks)
  - 12 interpreted sites

- Colonial Building Restoration

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Tourism and Culture Branch
Arts And Culture Centres
- The network of ACCs is unique in Canada –
- Provincial Touring, Client Rentals and Community Outreach and Resources
- 330 different live productions (550 performances) annually, with annual audiences of 200,000 patrons.
- ACCs are also a significant community resource for costumes, meeting rooms, rehearsal space, production expertise

Honour 100
- Commemorate Newfoundland and Labrador's First World War legacy
- Investment of more than $3.0 million
- Working with the Royal Newfoundland Regiment Advisory Committee and stakeholders
- Planning for the 100th anniversary of the Battle of the Somme at Beaumont-Hamel (July 2016)
The Annual budget (2015-16 Estimates) is $132.6M, less $4.5M in revenue (mainly from the Arts and Culture Centres) for a net budget of $128.1M.

This includes:

- funding for entities reporting to the Department (RDC - $21.9M, The Rooms - $6.6M, NLAC - $2.1M, NLFDC - $5.7M, MMDC - $0.8M and $0.5M HFNIL);

- $12.2M for the St. John's Convention Centre and $1.8M for the Colonial Building; and

- $1.3M for Tourism Marketing.

The department's salary budget is $20.9M and its operating budget is $10.3M.
Budget (continued)

Departmental supports for commercial and non-commercial clients include:

- $11.0M for the Investment Attraction Fund;

- $11.6M for the Regional Development Fund;

- $3.6M for the Business Development Support Program; and

- $4.1M for tourism and culture programs and support.

BTCRD provides additional commercial support through a revolving fund of approximately $13.5M within Business Investment Corporation.

- In 2015-16 disbursements will be approximately $7M
Impact

- Since 2013 over 1,300 projects valued at $79.1M have been approved—leveraged in excess of $245M in other support
- 67 CCB sessions were approved in 2014-15 including almost 1,300 participants
- In 2014-15, BTCRD completed 30 interviews and 25 follow-up action plans with business clients as part of its BR&E activities
- BR&E sector approach saw 44 interviews completed and 27 follow-up action plans provided to four sector groups.
- 98 per cent of the province's population have access to broadband service
- Between 2009 and 2014, non-resident visitation increased 22 per cent, while non-resident tourism spending increased 36 per cent, reaching $491 million in 2014, the highest level of non-resident spending ever
- Tourism spending reached $1 billion for the first time in 2011
- Over the last two years, we have lead 45 trade missions assisting 223 participants to 12 international markets
- In 2014-15 two Venture Capital Funds (Venture NL Fund and Build Ventures) were established
- Digital Media Tax credit program created
- MOU with Nunavut signed on July 16
Upcoming Events

- Tourism F/P/T Meeting (Winnipeg, Jan 13 & 14)
- NL Outfitters Association (NLOA) Convention and AGM (Corner Brook, January 13-15)
- St. John’s Board of Trade Business Outlook Conference (St. John’s, Jan 28)
- Northern Lights Conference (Ottawa, Jan 27-30)
- Innovation Summit (St. John’s, May 11)
- Beaumont-Hamel (France, July 2016)
  Arctic Technology Conference, (St. John’s, October 24-26, 2016)
Hot Issues

- Trade Agreements
- Broadband – Labrador proposal
- COF – Economic Innovation and Productivity Working Group
- Marble Mountain Development Corporation
- Large Project Impacts (Bull Arm, Muskrat Falls, Stephenville, Port Aux Basques and Marystown)
- Stephenville Airport
- Marine Industrial Park in Harbour Grace
- Grind Newfoundland AS
- Canada Fluorspar Inc.
- Significant Investment Prospecting
- Honour 100
- Colonial Building - Tenants
Infrastructure Projects

- Exxon/C-Core Ice Tank
- MUN Science Building
- Knowledge Park

Sec.34(1)(a); Sec.34(1)(b)
Upcoming Meetings

Meetings:
- St. John's Board of Trade
- Newfoundland Labrador Employers' Council
- Newfoundland Ocean Industries Association (NOIA)*
- Hospitality Newfoundland and Labrador
- Marble Mountain Development Corporation
- The Rooms
- Research & Development Corporation (RDC)
- NL Tourism Board
- Newfoundland and Labrador Arts Council (ArtsNL)
- Newfoundland and Labrador Film Development Corporation (NLFDPC)
- Newfoundland and Labrador Association of Technology Industries (NAITI)
- Newfoundland Environmental Industry Association (NEIA)
- Newfoundland & Labrador Organization of Women Entrepreneurs (NLOWE)
- Canadian Manufacturers & Exporters (CME)
- OceansAdvance Inc.
- Tour of our main ocean technology and arctic capabilities facilities
Ocean Technology and Arctic Opportunities Branch
To support and promote growth in Newfoundland and Labrador's ocean technology cluster by:

- Supporting business
- Strengthening ties between institutions and industry
- Marketing the sector locally, nationally and internationally.
Positioning the province as the path to the Arctic and creating an environment in which local stakeholders can benefit from emerging opportunities, northern communities can thrive, and that will further attract global industry leaders.
Diane Taylor – Director

Two Development Officers for Ocean Technology

One Senior Policy Analyst for Arctic Opportunities

One Clerk IV
Ocean Technology

Ocean Technology and Arctic Opportunities Branch

Newfoundland Labrador
Business, Tourism, Culture and Rural Development
Why Ocean Technology? Setting the Context.

- 1970s and 80s - Large investments in infrastructure and facilities
- 1990s - Shift in focus (changes in fisheries and oil and gas)
- 2004 - First "marine tech" sector strategy
- 2004 - OceansAdvance formed
- 2006 - Innovation Strategy (strong focus on ocean technology)
- 2009 - "Oceans of Opportunity" Strategy
- 2011 - New dedicated Branch
- 2015 - Setting framework for new strategy

Ocean Technology and Arctic Opportunities Branch
Ocean Technology in NL

- **Industry needs assessment almost complete**
- **Updated sector profile complete**
- **88 companies identified**
- **53 responded to survey**
- **1731 employees**
- **80% have technical education in science/engineering**
- **540M in revenue**
- **2/3 active in offshore energy**
- **New Sector Roadmap by March 31, 2016**
Existing Infrastructure

- Memorial University oceans-related Centres and R&D facilities
- C-CORE and associated Centres of Excellence
- The Ocean, Coastal and River Engineering facility of NRC

Ocean Technology and Arctic Opportunities Branch
Future Infrastructure

- Memorial
- New Science Building
- MI Expansion
- CCORE – new Centre
- Innovation Park Proposals

Ocean Technology and Arctic Opportunities Branch
Incubation to Commercialization

Ocean Technology and Arctic Opportunities Branch

- Big Data
- Real Time
- Custom Alerts
- Automatic Reporting

SubC Imaging
Underwater imaging equipment for marine research, deep-sea mining and the oil and gas industry.

Whitecap Scientific Corporation
Software development to convert off-the-shelf underwater digital video cameras into live 3D scanning systems (e.g., ROV3D™)

Newfoundland Labrador Business, Tourism, Culture and Rural Development
Ocean Technology Leaders

- Simulation
- Sonar/Radar

Ocean Technology and Arctic Opportunities Branch
Ocean Technology Capacity Building

- Sector Development
- Cluster Leadership
- International Outreach
- Business Development Supports

Ocean Technology and Arctic Opportunities Branch
Future Direction – Strategic Target State

1. Continue to mature and develop processes for key Ocean Tech sector support activities using best practices and lessons learned.

2. Increase business understanding and capabilities within ocean technology companies.

3. Increase commercialization potential of research and development initiatives.

4. Increase business opportunities for Ocean Tech companies.

5. Continue to deliver relevant programs and support activities as is currently being offered.

Ocean Technology and Arctic Opportunities Branch

Newfoundland Labrador
Business, Tourism, Culture and Rural Development
The Arctic Opportunities Initiative (AOI)

Ocean Technology and Arctic Opportunities Branch
Four Strategic Directions

Arctic Opportunities Initiative

Position NL as the "Path to the Arctic"
Build Capacity
Foster Economic Development and Business Opportunities
Research and Development

Ocean Technology and Arctic Opportunities Branch
Current Partners

- Department of Business, Tourism, Culture and Rural Development
- Labrador and Aboriginal Affairs Office
- Department of Natural Resources
- Department of Municipal and Intergovernmental Affairs
- Research and Development Corporation
- Fisheries and Marine Institute
- Nunatsiavut Government
- NunatuKavut

Ocean Technology and Arctic Opportunities Branch
The Path to the Arctic

- Strategic location
- Adjacent to Arctic like waters
- Located on international shipping lanes and northern sea routes
- Home to Arctic communities and Aboriginal peoples
- Transportation and logistical expertise
- Mature supply and service sector with ice-classed vessels
- Safe and sustainable development of natural resources in harsh environments
- Diverse and environmentally sustainable northern mining industry

Ocean Technology and Arctic Opportunities Branch
The Path to the Arctic

- Industrial infrastructure to support Energy, Mining, Fisheries
- World-renowned OT cluster and R&D facilities
- National Centres of excellence in Arctic research and development
- Superior ice detection, surveillance and management expertise
- Leader in remote satellite monitoring and communications
- Leading provider of academic and skills development programs, and remote northern education

| Ocean Technology and Arctic Opportunities Branch |
Priority Areas

- Strategic Alliances with Nunavut and Greenland
- AOI Action Plan
  - Positioning (Path to the Arctic)
  - Capacity Building
  - Economic Development
  - R&D
- Targeted International Events
- Relationships with the Federal Government
Nunavut MOU

- Signed in St. John's in July 2015
- Focuses on collaboration
- Natural Resource Development
- Education and Training
- Transportation and Infrastructure
- Culture and Tourism
- Research and Development
- Health Care
- "Cooperation and Implementation Committee"
- First meeting anticipated around the Northern Lights Conference in 2016
- A secretariat will support the committee
Greenland MOU

Pre-June 2015:
- Meetings:
  - ATC 2015 in Copenhagen
  - Future Greenland 2015 in Nuuk
  - NMC conference in St. John's
- Ongoing correspondence with representatives from the Ministry of Mineral Resources

October-November 2015:
- Meeting held with Government of Greenland at the Arctic Circle Conference
- A follow up letter was sent to provide a copy of the Nunavut MOU and to request another meeting, potentially around Northern Lights or in Greenland.
- Responsibility for MOU for Greenland to reside with the Department of Foreign Affairs.

Ocean Technology and Arctic Opportunities Branch
Upcoming Event – Northern Lights 2016
(Jan 27-30, 2016)

* BTORD organizing strong presence
* Government partnership panel including speakers from NU and CAaNOR.
* Separate Panel focused solely on NL as the path to the Arctic
* Proposed networking reception with Memorial, the St. John’s Board of Trade, the Labrador North Chamber of Commerce and others.
* Large exhibition space (available to all NL participants)
* Invitation forthcoming for the Premier/Minister to speak at a keynote luncheon.
* Good venue for side meetings with respect to the Nunavut MOU and the federal partners for the ACI.
* Inaugural meeting of the NL/NU MOU Implementation and Cooperation Committee

Ocean Technology and Arctic Opportunities Branch
Ocean Technology and Arctic Opportunities Branch
Innovation and Sector Development Branch
Drivers of Economic Growth

Innovation and Sector Development

Three Paths to Economic Growth:
- Attracting Firms from Outside
- Expansion of Existing Firms
- Creation of New High Growth Potential Firms
Innovation, Productivity & Competitiveness...
Interrelated, but not synonymous
Innovation

"a process through which economic or social value is extracted from knowledge through the creating, diffusing, and transforming of ideas to produce new or improved products, services, processes, strategies, or capabilities"

– Conference Board of Canada

Innovation and Sector Development
Productivity

"economic output per unit of input (labor, machines and energy)"
– Information Technology and Innovation Foundation

Innovation and Sector Development
"a measure of a region's advantage or disadvantage in selling its products in international markets"

- Organization for Economic Co-operation and Development
Commerce

Customer

Entrepreneur

$$$ Trust Relationship Value

Innovation and Sector Development

Newfoundland Labrador
Business, Tourism, Culture and Rural Development
The Work of the Branch

- Growing the pool of entrepreneurs
- Growing the pool of innovators
- Facilitating relationships
- Enhancing the value proposition
- Maximizing benefits ($)

Innovation and Sector Development

Newfoundland Labrador
Business, Tourism, Culture and Rural Development
**The Branch**

**Innovation and Advanced Technologies**
- Director - Doriann Coombs
- Manager - Ed Janes
- 8 Economic Development Officers (2 vacant)

**Sector Development**
- Director- Kirk Tilley
- 9 Economic Development Officers (1 vacant)

**Information Management**
- Directors - Ruth Parsons and Sharon Tiller
- 6 IM/Administrative Officers
Growing the Pool of Entrepreneurs

Innovation and Sector Development
Growing the Pool of Entrepreneurs

Incubators

Accelerators

Impact

• Creation of the Memorial Centre for Entrepreneurship
• Creation of the Centre for Social Enterprise and Social Innovation
• NL firms received 75 per cent ($63M) of total venture capital and private equity raised by Atlantic Canadian tech startups in 2014

Innovation and Sector Development
Entrepreneurship in the absence of innovation stifles growth. Innovation in the absence of entrepreneurship is lost opportunity.
Growing the Pool of Innovators

- MUN Tech Transfer & Commercialization
- CNA Applied Research/Industry Outreach
- Youth Innovation
- Continuous Improvement Networks
- Translational Personalized Medicine Initiative
- Fibre Arts Conference
- Innovation Week

Impact
- Establishment of the Craig L. Dobbin Genetics Research Centre
- Investment in 172 highly interactive youth innovation projects in elementary and secondary school throughout the province
- Establishment of the Genomics-Based R&D Center for Hearing Science in Grand Falls Windsor

Innovation and Sector Development
Facilitating Relationships

- Supplier Development – Operator to Supplier Commerce
- Continuous Improvement Networks – Business to Business Leveraged Learning
- Market Development Trade Shows – Business to Customer
- Business Networking Events – Informing/Celebrating
- Collaborations - Industry/Institutional Partners and Federal Government

Impact
- Partnership between the Faculties of Engineering and Business
- Establishment of the MUN Tech Transfer/Commercialization Strategy
- Innovation Week multi-sector collaboration

Innovation and Sector Development
Enhancing Value Proposition

Investing In:
- Critical Enabling Infrastructure – (e.g. broadband)
- Firm-Level Technology Enhancements
- Productivity Improvements
- Business Sophistication
- Market Development Support
- Counseling/Mentoring

Impact
- Over 98 per cent of the population with access to broadband service
- Creation of Continuous Improvement Networks
- Lean certified firms

Innovation and Sector Development
Maximizing Benefits

- ICT
- Life Sciences
- Aerospace and Defence
- Green Economy
- Manufacturing
- Craft
- Food, Beverage and Agrifoods

Innovation and Sector Development
Information & Communications Technologies (ICT) (Intersects with all sectors)

- Firm Level Technology Investment
- Digital Media
- Analytics/Big Data
- Leveraging Broadband Infrastructure (export conduit)
- Training & Education
- eLearning/Simulation
- Collaboration with Newfoundland and Labrador Association of Technical Industries (NATI)

Impact
- Establishment of the Interactive Digital Media Tax Credit
- Stimulation of competition in telecommunications services
- Leveraged private and federal funding for foundational ICT infrastructure

Innovation and Sector Development
Life Sciences

• Founder Population - comparative advantage
• Translational and Personalized Medicine Initiative – commercialization
• Genomics in other sectors
• Collaborations with Health and Community Services, Memorial University, IBM, NATI, Newfoundland and Labrador Centre for Health Information, Centre for Health Informatics and Analytics, Strategy for Patient-Oriented Research and others.

Impact

• TPMI public/private partnership
• Venture Newfoundland and Labrador first investment in life sciences firm Sequence Bio, levering additional private sector investment
• Commercial opportunities from gene-discovery
Aerospace and Defence
(Strong Linkage with Ocean Technology)

- Key Industrial Capabilities (KIC's)
- Leveraging Benefits Agreements (Industrial Technology Benefits/Industrial Benefits Agreements)
- Large Scale Opportunities
  - National Shipbuilding Procurement Strategy
  - Fixed Wing Search and Rescue
- Collaborating with Aerospace and Defense Industry Association of Newfoundland and Labrador (ADIANL)

Impact
- Boeing investment in Solace Power (ITB)
- Bombardier water-bomber IBA
- CAE helicopter training and R&D center

Innovation and Sector Development
Green Economy

- Green Economy Report
- Programming for "Greening" of Business
- Green Economy Action Plan Commitment
- Collaborating with Newfoundland and Labrador Environmental Industry Association (NEIA)
- An area that warrants greater attention and resources
Manufacturing
(Intersects with several sectors)

- Continuous Improvement Networks
- Productivity/Efficiency - Lean Manufacturing
- Canadian Manufacturers and Exporters (CME) - Action Plan

Impact

- Several companies have seen dramatic cost savings as a result of lean interventions

Innovation and Sector Development
Craft
(Intersects with Tourism, Culture and Heritage)

- Product Quality & Production
- Business Counseling
- Cultural Product Development
- Trade Shows
- Collaborating with Craft Council of Newfoundland and Labrador
- The Plantation

Impact

- Producers and retailers participating in our cultural product development initiative have experienced sales growth
Food, Beverage and Agrifoods
(Intersects Manufacturing and Tourism)
- Food Security
- Culinary Tourism
- Business Counseling
- Local Supply Chain
- Export Readiness

Impact
- Initiatives have helped increase the awareness and use of locally made and grown products

Innovation and Sector Development
Recommended Briefings

Opportunities:
- Rural Broadband
- Council of the Federation - Economic Productivity and Innovation Working Group (EPIWG)
- Translational and Personalized Medicine
- Interactive Digital Media
- Startup Ecosystem
- Supplier Development
- Continuous Improvement Networks
- Innovation Ecosystem Tour
Lead agency for economic development

Locations
- Corporate office in St. John's
- Portfolio Management in Marystown
- 5 Regional offices
- 15 Field offices
- Co-located with Tourism Officers in Gander, Corner Brook and Labrador West
- Some co-location NRC, ACOA, DFA etc.

Regional and Business Development Branch
Regional and Business Development Branch

Approximately 100 staff

Regional Economic Planning and Development Division
• Gillian Skinner, Director, Regional Economic Planning and Development
• Nadine Emberley, Manager, Regional Economic Development
• Larry Weatherbie, Director, Industrial Adjustment

Business Analysis Division
• Liane Price, Director, Business Analysis
• Michael Day, Manager, Business Investment

Portfolio Management Division
• Guy Edwards, Director, Portfolio Management
• Sharon Patten, Manager, Portfolio Management
Regional and Business Development Branch

Field Operations (5 Regional Offices; 15 Satellite Offices)
- Jim Anstey, Regional Director, Avalon
- Denis Sullivan, Regional Director, Eastern
- Percy Farwell, Regional Director, Central
- John Davis, Regional Director, Western
- Reg Kean, Regional Director, Labrador
Developing Strong Regions

Pillars
- Research
- Capacity Building/Skills Development
- Marketing
- Infrastructure

Partners
- Academia
- Not for Profits
- Social Enterprises
- Federal & Municipal Governments

Products
- Non-commercial Activities
- Commercial Activities

Regional and Business Development Branch
Partners

- Key line departments and agencies (NR/DFA/AES/Education/RDC/OPE)
- Federal Government (primary- ACOA)
- Municipalities
- Industry Associations
- Business Community
- Chambers of Commerce
- Community Business Development Corporations (CBDCs)
- Other Economic Development Groups

Regional and Business Development Branch
Regional Economic Development and Business Activities - External

Frontline Service Delivery for All Programs and Services

Co-operative Development

Social Enterprise Development

Economic Planning and Opportunity Management

Capacity Building/Facilitation

Business Counseling/ Business Retention and Expansion Process

Industry Adjustment

Newfoundland Labrador Business, Tourism, Culture and Rural Development

Regional and Business Development Branch
Regional Economic Development and Business Activities - Internal

Evaluation Supports and Processes

Labour Market Development Agreement/LMA Engagement

Oversight and Management of Dept Programs

Oversight of Special Projects (eg. Shorefast)

Cross Dept. Initiatives (eg. Poverty Reduction Strategy)

Policy Research and Development

Financial and Audit Controls

Regional and Business Development Branch
Economic Interventions

Community Industrial Adjustment
- Provides support to communities affected by major industrial downsizing.
- Coordination of government departments, community organizations, industry and other partners.
- Facilitation of response plan development and implementation among stakeholders.

Examples
- Forestry (mill closures in Grand Falls-Windsor and Stephenville)
- Fishery MOU
- Mining- Labrador West

Regional and Business Development Branch
Business Retention and Expansion (BR&E)

- An internationally recognized economic development tool that helps identify and address barriers to survival and growth faced by local businesses.
- It is based on the philosophy that existing firms are the key to regional economic prosperity.
- Business counselling philosophy.
- Diagnostic Process (one on one interview with business, development of action plan, linking business clients to programs and services to address red flags).
- BTCRD winner of 2012 International Award for BR&E.

Regional and Business Development Branch
- Data Collection and Statistical Analysis
- Applying a sector approach
- Since 2010, over 300 business diagnostic interviews have been conducted in Newfoundland and Labrador.
- Resulting in uptake of over $5M of BTCRD's funding to address business challenges with competitiveness and growth.
Common Issues

- **Marketing:** no marketing plans, assistance to expand facilities, markets and staff
- **Operations:** use of productivity improvement programs, technology improvements, inventory management
- **Funding:** financial planning, financial assistance with expansion plans
- **HR:** training/skills development, attraction of skilled employees for future growth, succession planning

Regional and Business Development Branch
Engaging Communities-Opportunity Management (OM)

- Ongoing facilitation of planning and development processes with industry and communities.
- Constant identification of business and community development opportunities that can be implemented to sustain or improve the local economy.

Regional and Business Development Branch
Opportunity Management

Regional and Business Development Branch

Doing things right

Stage 1 - Opportunity Identification
Stage 2 - Recognizing Opportunities
Stage 3 - Driving Opportunities
Stage 4 - Monitoring & Evaluation

Doing the right things
Example: Destination Development Plan (DDP)

- DDP report/inventory prepared and completed for each region using phased approach. Tourism Branch leading report development in partnership with Tourism Board stakeholders.

- Tourism Board decision for BTCRD to customize an OM Process as implementation phase of the report.

- Regional Economic Development Branch customized an OM process in partnership with Tourism Board stakeholders to bring all recommendations to industry for review and prioritization. REDS facilitating the engagement process.

- Sub Regional sessions are taking place to determine priorities for stakeholders and presented to DMO boards for final prioritization.

- Action plans are being developed and task teams created for initiative implementation.
A lasting collaborative effort among the DMO region including:

- Information sharing;
- The establishment/enhancement of relationships between participants (e.g., NFP and private operators);
- Moving from a report to a work-plan;
- The formation of task teams to support the development and implementation of initiatives.
Building Capacity

- Non-profits and municipalities, just like businesses, need to focus on building the capacity of their entire organization if they want to maximize their impact.

- The Department assists business, community and economic development stakeholders to build capacity through:
  - Access to enterprise and entrepreneurial skills for non-profits
  - Enhancing coordination, planning and implementation skills
  - Enhancing skills essential for leadership
  - Leading or supporting development initiatives

Regional and Business Development Branch
Example: Municipal Capacity Building

- Assist municipal capacity building (ex. project management).
- Encouraging local councils to work together.
- Using local planning capacity together with municipalities to highlight opportunities for cooperation and opportunity maximization.
- Support Municipal Partnerships
  - Multiple Municipalities; Municipal and Industry Association; Joint Councils.
- MNL Economic Development Project-pilot project of CED tool to encourage economic dev partnerships

Regional and Business Development Branch
Co-operative Development Approach

- Advances the co-operative model to support business growth in rural communities throughout the province.

- 2007 and 2012 MOU with NL Federation of Co-operatives (NLFC).
  - Joint annual work plan

- Regional network of 7 co-operative developers (staff).

- Identify co-operative opportunities, initiate regional projects, and promote the co-op model for business.

- New co-op research with targeted engagement is leading to new community co-ops.
Business Financing and Portfolio Activities

- Assesses, negotiates, brokers, and monitors Business Investment Fund and sector enterprise initiatives.
- Provides business case analysis, including detailed financial analysis and advisory services on projects and loans.
- Lead in evaluation of FDI proposals. Due diligence, negotiation of Ts&Cs, preparation of funding requests and cabinet papers.
- Business analysis for other BTCRD Divisions and Departments (DFA/NR/TW/Forestry), with respect to investment (eg. Kruger).
Oversight of Crown Corps.

- Business Investment Corp. (BIC) is the successor entity to Enterprise Newfoundland and Labrador Corp. (ENLC)
- Newfoundland Hardwoods Ltd (NHL)
- Economic Diversification and Growth Enterprises (EDGE)
- NL Immigrant Investor Fund Ltd.
NL Immigrant Investor Fund Ltd.

• NLIIFL was established in 2005 to receive, administer and disburse funds from Citizenship and Immigration Canada under the Business Immigration Program.

• Funds received have an administration fee of either 5 or 7%, are interest free and repayable at the end of five years, repayment is guaranteed by the Province.

• Fund presently has balance of approximately $165 M, with $98 M going to the MUN Science Building.
## Business Investment Fund

<table>
<thead>
<tr>
<th>Business Investment Support</th>
<th>Business Development Support</th>
<th>Investment Attraction Fund</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Loans/Equity</strong></td>
<td>Grants</td>
<td>FDI- Loans/Equity</td>
</tr>
<tr>
<td>Intended for NL domestic and emerging companies</td>
<td>Assists NL SMEs with opportunities to increase productivity and improve competitiveness</td>
<td>Extension of former Business Attraction Fund (BAF); attract inward investment to NL.</td>
</tr>
</tbody>
</table>
| Low interest (3%) Flexible Repayable Loans | Eligible Activities:  
- Productivity improvement  
- Knowledge development  
- Market development  
- Green technologies  
- Travel stipends  
- Professional technical assistance | Used to support:  
- Attraction of companies to the province  
- Expansion of local companies as result of inward investment |
| Available:  
- Term Loan ($500K/project; max. aggregate of $1M)  
- Equity Investment ($500K/project, max. aggregate of $1M) | Projects funded to max of 50% of total eligible costs to a max. of $100K/yr (based on eligible costs of $200K/yr) | Investments in form of repayable term loans, equity, and forgivable loans |
$1 Million +
- Requires Cabinet decision
- Rare

$500K - $1M
- Decisions made by BIC Board of Directors
- 9 member autonomous board: 5 private sector, one vacancy, 2 ADMS (BTCRD and Finance) and BTCRD DM
- Appointed in December 2014, three year term
- Meet as needed

Up to $500K
- Business Investment Management Committee (BIMC), sub-committee of BIC, includes four BTCRD ADMs and BIC Board rep
- Business Dev Support Mgmt Committee- includes four BTCRD ADMs
- Biweekly meetings
## Business Investment Fund

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</tr>
<tr>
<td>Since 2005, $32.5 M approved in loans and equity</td>
<td>2013-14: $2.8 M approved</td>
<td>$11 M annual allocation</td>
</tr>
<tr>
<td>2015-16: $3.7 M approved, 19 loans/equity</td>
<td>2014-15: $2.3 M approved</td>
<td>$35 M in approvals to Nov 2015</td>
</tr>
<tr>
<td>2015-16 (to date): $3 M approved; $1.9 M in hopper</td>
<td>2015-16 (to date): $3 M approved; $1.9 M in hopper</td>
<td>2015-16 (to date): $3 M approved; $1.9 M in hopper</td>
</tr>
</tbody>
</table>
- BIC Portfolio: Investment Portfolio- 458 Accounts (131 Equity investments @ $10.1M and 327 loans @ $24.8M); Cash position $13.5M.

- Fisheries Loan Guarantee Program (FLGP) (86 guarantees o/s at $48M (as of September, 2015).

- Venture Capital ($10M Build Ventures Fund- $3.5M drawn, $10M made in NL Fund - $1M drawn).

- Special Projects (e.g., Canada Fluorspar Inc.) $17M, approx. $16.2M to be drawn.
Portfolio Management Division

- Located in Marystown.
- Provides corporate comptrollership and financial accounting activities related to business investments made under the Business Investment Corporation and its predecessor agencies.
- Manages and monitors revenue collections on overall investment portfolio of over $34.9M.

Regional and Business Development Branch
Regional Development Fund (RDF)

- Non-repayable, non-commercial, multi-year initiatives (pre-commitment)
- Applicants: Not-for-profit organizations, excluding federal and provincial government departments and agencies. Includes industry associations, municipalities, public educational institutions, and other not-for-profit groups including co-operatives and economic development organizations.
- Current: Regional Development Fund (RDF)
  - 2014-15: $11.329M approved
  - 2015-16: $11.56 M budget; fully committed
    - Additional $2.7M pre-committed for 2016-17
- Historical: Regional/Sectoral Diversification Fund (RSDF)
  - 2005-2015: More than $75M invested and more than $300M leveraged.
Regional Development Program

Examples of Investments:

- Red Bay Wayfinding & Signage
- Gros Morne Cultural Blueprint Implementation
- Connaigre Peninsula: wharf and other infrastructure, supporting aquaculture industry
- Newfoundland Independent Filmmakers Co-op: high definition and surround sound
- Environmental Lab at Grenfell
- CNA- Labrador
- East Coast Trail Development
- Ocean Research Learning Partnerships
- Support for key sector organizations ($100K per year, per org)
- Aerospace and Defence Industry Association of NL (ADIANL)
- Canadian Manufacturers and Exporters (CME)
- Craft Council of Newfoundland and Labrador
- Newfoundland and Labrador Association of Technology Industries (NATI)
- Newfoundland and Labrador Environmental Industry Association (NEIA)
- Newfoundland-Labrador Federation of Co-operatives (NLFC)
- Newfoundland and Labrador Organization of Women Entrepreneurs (NLOWE)
- Oceans Advance (OA)

Regional and Business Development Branch
### 4 Pillars of Community Capacity Building Program

<table>
<thead>
<tr>
<th>STRATEGY &amp; PLANNING</th>
<th>RELATIONSHIP BUILDING</th>
<th>ORGANIZATIONAL SKILLS &amp; MANAGEMENT</th>
<th>CO-OPERATIVE DEVELOPMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strategic Planning</td>
<td>Community Development</td>
<td>Organizational Governance</td>
<td>Basics of a Co-operative</td>
</tr>
<tr>
<td>Proposal Writing</td>
<td>Public Participation</td>
<td>Board Orientation</td>
<td>Co-operatives and the Community Development Process I</td>
</tr>
<tr>
<td>Project Management</td>
<td>Alternative Dispute Resolution</td>
<td>Meeting Management</td>
<td>Co-operative and the Community Development Process II</td>
</tr>
<tr>
<td>Opportunity Identification</td>
<td>Group Dynamics</td>
<td>Leadership and Motivation</td>
<td>Interpersonal Communications</td>
</tr>
<tr>
<td>Opportunity Management</td>
<td></td>
<td></td>
<td>Communications Planning</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Legal Issues</td>
</tr>
</tbody>
</table>

**Regional and Business Development Branch**
Community Capacity Building Program

- Average # of workshops per year – 100
- Total Workshops Since 2009 - 639
- Total Invested Since 2009 - $ 1,587,327 (includes Poverty Reduction Strategy supports 09-12)

Regional and Business Development Branch
Community Capacity Building Supports- Examples

- Tourism Southwest delivered a strategic planning session with tourism stakeholders and towns to focus on a common plan and identify opportunities for collaboration in their area. An action plan was developed.

- Town of Red Bay delivered an opportunity management planning session with a number of stakeholders in the Southern Labrador region, to explore and prioritize the projects coming out of the Visitor Experience Master Plan related to World Heritage Site designation.

- Corner Brook Farmer's Market Co-operative, in partnership with the Newfoundland Labrador Federation of Cooperatives, held a co-op development workshop for a new co-op development steering committee in Corner Brook. (Aug 2015)
Regional Highlights

Regional and Business Development Branch
Developing Strong Regions - Critical Factors

- Quality economic and social infrastructure.
- Recognize the linkages between social, cultural and economic planning and development.
- Improved regional cluster development.
- Communities and people thinking and acting regionally, strong community leaders and champions.
- Recognize innovation, technology, productivity and competitiveness as the cornerstones for industrial development.
Developing Strong Regions- Critical Factors

- Being positioned to participate in the global economy.
- Access to high quality education, training mechanisms for skilled workforce.
- Access to applied research and technology transfer.
- Emphasize regional strengths in industrial development.
- Facilitation and engagement of stakeholders in economic development.
- Cooperation in service delivery (i.e. cooperation and coordination between multiple levels of government).

Regional and Business Development Branch
Tourism and Culture Branch
Tourism and Culture

- 284 staff permanent, seasonal and call in staff located throughout the province

Tourism:
- Tourism Research
- Tourism Marketing
- Tourism Product Development

Culture:
- Arts
- Heritage
- Arts and Culture Centres

Regional Presence:
- 8 Visitor Information Centres
- 6 Arts and Culture Centres
- 12 Provincial Historic Sites
Tourism Strategy and Activities
Tourism Vision

- **Uncommon Potential – A Vision for Newfoundland and Labrador Tourism (2009)** – a strategy for development of the tourism industry. Seven strategic directions:
  - Private Public Leadership
  - Sustainable Transportation Network
  - Market Intelligence & Research
  - Product Development
  - Tourism Technology
  - Marketing Our Brand
  - Developing Our Workforce

- NL Tourism Board mandated to lead the implementation
- Double tourism spending to $1.6 billion by 2020.
Tourism Research

- Staff of four located at corporate headquarters in St. John's including Director, Research Analysts (2) and Accommodations Data clerk
- Ensuring accessible, timely, high-quality market intelligence and research to support planning and continued growth of the tourism sector.
- Developing and implementing a research strategy and measuring the success of Uncommon Potential
- Conducts primary research and takes part in partnered research with National and Atlantic Canada tourism partners
- Partnership with the Economics and Statistics Branch, Department of Finance

Tourism and Culture Branch
2016 Exit Survey

- Provincial Exit Survey last conducted in 2011 – 67,000 interviews and 4,100 completed questionnaires
- Basis for estimating non-resident visitors and spending
- Visitor profiles (demographics, origin, purpose)
- Planning with NLSA since 2013
- 12 month survey launches in January 2016 at Deer lake and St. John’s Airports and Port-Aux-Basques
- Peak season at Gander, Goose Bay and Argentia
- Cost of $472,987 (MQV Research)
Marketing Mandate

- Increase non-resident and visitation and spending
- Research driven market focus
- Differentiate Newfoundland and Labrador
- Focus on unique selling points with a consistent and relevant brand message
- Maximize and leverage paid, owned and earned media/channels
Tourism Marketing

- 17 staff located at corporate headquarters, St. John's
- Fully Integrated Tourism Marketing Program
  - Advertising and Communications
  - Travel Trade and Sales
- 227 awards Award winning marketing and advertising campaign
- From 2009 to 2014 visitation increased 22% and spending increased 36%
- $1.5 million non-resident visitors from 2012 to 2014
- The tourism industry's contribution to the Newfoundland and Labrador economy – spending of $1.0 billion
- Visitation increased 2.3% to the end of September

Tourism and Culture Branch
Priority Markets

- Touring Explorer
  - Leisure travellers seeking sightseeing and soft-adventure experiences (nature, culture experiences, lifestyle)
- Lifestyle
  Sophisticated and experienced travellers seeking unusual places and experiences “off the beaten track”
- Demographics
  Singles and couples in pre- and post-nest life stage 45+ (primary) and 25-34 (secondary)
  Well-educated, higher than average income
- Hunting & Angling
- Meeting Convention & Incentive Travel (MCIT)
- Travel Trade and Media

Tourism and Culture Branch
Geographic Markets

Touring Explorer:
- Primary Canada
  - Ontario
  - Western
  - Maritimes
  - Quebec
- Secondary USA
  - Mid Atlantic
  - New England
- Developmental
  - UK and Germany

Tourism and Culture Branch
Tourism Marketing Activities

- Advertising Campaigns
  - Non resident including Hunting & Angling and winter
- Digital marketing and Social Media strategy
- Travel Media
- Customer Response and Information
  - Tourism website, publications, contact centre, mail distribution, Tourism Destination Management System (TDMS)
- Travel Trade and Consumer Sales
  - Sales missions, marketplaces, consumer shows and promotions, trade shows
- Joint Marketing Agreements with tour wholesalers and operators

Tourism and Culture Branch
Tourism Product Development

- 10 staff located at corporate headquarters, St. John's
  - two located in regional offices (Gander, Corner Brook)

- Product Development mandate is to facilitate the development of tourism products and experiences that:

- Visitor Services
  - 8 visitor Information Centres - 2 operate year round

- Accommodation Licensing - Tourist Establishment and Innkeepers Act and Regulations

- Highway signage
Tourism Product Development

- Destination Development Planning
- Product experience enhancement – i.e. culinary, hiking, birding, and whale watching
- Season Extension Initiatives
- Tourist Oriented Directional Signage (TODS)
- Tourism Assurance Plan (TAP)
- Regional VIC Funding
- Market Readiness Support
- Best Practices

Tourism and Culture Branch
Tourism Product Development

- Respecting Tourism Values in Resource Management:
  - Environmental, Crown Lands, Quarry permits
  - ILUC committee
  - Forestry plans

- Outfitting
  - Non resident Big Game Allocations
  - Licensing Outfitting establishments

Tourism and Culture Branch
Partners and Stakeholders

- Hospitality Newfoundland and Labrador (HNL)
- NL Tourism Board
- Regional Destination Management Organizations (DMOs)
- NLOA - Outfitters Association
- Newfoundland Labrador Snowmobile Federation (NLSF)
- Tourism Quality Assurance of Newfoundland and Labrador Inc. (formerly Canada Select)
- Atlantic Canada Tourism Partnership (ACTP)
- Destination Canada
Priority Tourism Issues

- Proposed Accommodation Tax
  - Municipal Fiscal Framework review
- Highway Signage
  - Recent changes to 1999 Highway signage regulations
  - TODS implementation
- Outfitting Industry
  - Changes to non-resident big game allocations and responsibility transfer to ENVC
- Sharing Economy
- Sustainability of tourism and culture attractions

Tourism and Culture Branch
Creative Newfoundland and Labrador — released 2006
Encompasses Arts and Heritage sectors

- 10 strategic directions

- Includes strategies for creation of art; recognition of artists; protection of tangible and intangible cultural heritage; cultural industry development; cultural education; Aboriginal; cultural tourism and; cultural research

- Planning underway for a review
Entities and Stakeholders

- Heritage Foundation Newfoundland and Labrador – GNL Entity
- Association of Heritage Industries (AHI) Association of NL Archives (ANLA)
- Museum Association of Newfoundland and Labrador (MANL)
- Family History Society
- Newfoundland Historic Trust
- Newfoundland Historical Society
- Historic Sites Association
- NLAC – Entity
- NLFDC – Entity
- Resource Centre for the Arts
- Music NL
- Film Producers Association of NL (PAN)
- Newfoundland Independent Filmmakers Co-op (NIFCO)
- Visual Artists Association of NL (VANL)
- Writers Alliance of Newfoundland and Labrador (WANL)
- Dance NL
- Business and the Arts
- 120 + community heritage organizations and museums
Arts Programs and Services

- Cultural Economic Development Program $1.2 million to support economic development in Arts (50 approvals annually)
- Publishers Assistance Program $200,000 for marketing, editing, design and professional development
- Arts and Letters program $150,000. Award program junior and senior divisions, annual awards show and exhibit at The Rooms Art Gallery
- Cultural Events Program $70,000 supports 70 community events, Come Home Years etc.
- Music NL $300,000 supports recording, touring and professional development
- East Coast Music Association

Tourism and Culture Branch
Arts and Culture Centres

- Arts and Culture Centres are platforms for the celebration and preservation of the unique artistry and history of the province.

- ACCs are both a rental and touring presentation venue network; rentals are about 90%, the remainder are the Division's purchased or produced touring programs or regional initiatives.

- The ACCs had 600 performance nights, with annual audiences of about 200,000 patrons

- Total budget $6.3 million: revenue of $4.0 million

Tourism and Culture Branch
Honour 100

- Acknowledge and remember Newfoundland and Labrador's First World War legacy
- Investment of more than $3.0 million
- The Honour 100 initiative is categorized into five pillars:
  1) Anniversaries; 2) Legacy; 3) Education; 4) Outreach; and 5) Research and Development.
- Working with the Royal Newfoundland Regiment Advisory Committee, a steering committee has been formed to advise on plans for the commemorative years.
- Commemorations will include the 100th anniversaries of significant First World War events notably the 100th anniversary of the Battle of the Somme at Beaumont-Hamel
- Cultural Economic Development Program (CEDP) $1.3 million for preservation and sustainability of heritage resources (140 approvals annually)
- Provincial Historic Commemorations Board (PHCB) $37,000 commemorating aspects of provincial historic significance (people, places and events – 17 designations to date)
- Heritage Foundation NL (HFN) $515,000 responsible for designating Registered Provincial Heritage Structures and Districts; education; municipal outreach
- Intangible Cultural Heritage Strategy (ICH) coordinated by the HFN including Aboriginal Cultural Heritage Fund
- Regulatory agency for all archaeology conducted within the Province
- Responsible for:
  - Archaeological Site Management and Protection – 1,837 sites NL, 3,286 in Labrador
  - Archaeological Permitting
  - Review of Land Use Applications
  - Development of Policy and Procedures
  - Consultation (LIL)
  - Education
Provincial Historic Sites

- Designated under Historic Resources Act
- Interpret and protect province’s most significant heritage resources
  - 19 designated sites (3 shipwrecks)
  - 12 interpreted sites
- Recapitalization plan ($1.2 million approved budget 2014/15 – 2018/19)
- Focus on innovative programming, experiences and partnerships
- Visitation up 16.6% for 2015
Colonial Building

- Funding ($22.3 million approved)
- Exterior work nearing completion
- Work started on interior finishes
- Interpretive Framework finalized
- Planned opening date 2017
- Heritage Groups – Office relocation
Culture – Priority Issues

- Colonial Building Office space
- Heritage groups Honour 100
- July 1 2016 Beaumont Hamel
- Caribou Monument at Gallipoli
- Status of the Artist
- Cultural Plan review
Potential Legislative Agenda

- Historic Resources Act
  - Paleontological Resources
  - Human Remains Policy

- Pedestrian Trails Liability Act
  - Ongoing East Coast Trails Request

Tourism and Culture Branch
Early Action

- Tourism FPT meeting
  - Winnipeg, MB January 13-14 2016
- Newfoundland Labrador Outfitters Association (NLOA)
  - AGM January 13 - 15, 2016 in Corner Brook
- Premier and Minister’s participation in July 1, 2016 commemorations at Beaumont Hamel.
- Calls and meetings with:
  - Hospitality NL and NL Tourism Board
  - Arts NL
  - Marble Mountain Development Corporation
  - Heritage Foundation NL
  - NL Film Development Corp
<table>
<thead>
<tr>
<th>Component</th>
<th>Budget 2015-16</th>
<th>Revised 2016-17</th>
<th>Budget 2016-17</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourism Marketing/Research</td>
<td>16,452,100</td>
<td>13,883,500</td>
<td>11,531,300</td>
</tr>
<tr>
<td>Revenue</td>
<td>(80,000)</td>
<td>(77,000)</td>
<td>(80,000)</td>
</tr>
<tr>
<td>Tourism Marketing/Research - Net</td>
<td>16,372,100</td>
<td>13,806,500</td>
<td>11,451,300</td>
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<tr>
<td>Heritage Product Development</td>
<td>14,775,100</td>
<td>14,753,200</td>
<td></td>
</tr>
<tr>
<td>Revenue</td>
<td>(40,000)</td>
<td>(40,000)</td>
<td>(60,000)</td>
</tr>
<tr>
<td>Strategic Product Development - Net</td>
<td>14,735,100</td>
<td>14,713,200</td>
<td></td>
</tr>
<tr>
<td>Marble Mountain Development Corporation (operation)</td>
<td>845,000</td>
<td>845,000</td>
<td>845,000</td>
</tr>
<tr>
<td>NMDP (infrastructure)</td>
<td>1,400,000</td>
<td>2,000,000</td>
<td>5,000,000</td>
</tr>
<tr>
<td>Culture and Heritage</td>
<td>3,292,000</td>
<td>3,292,000</td>
<td>3,292,000</td>
</tr>
<tr>
<td>Revenue</td>
<td>520,000</td>
<td>520,000</td>
<td>520,000</td>
</tr>
<tr>
<td>CURUP and Home $ - Net</td>
<td>5,011,000</td>
<td>5,011,000</td>
<td>5,011,000</td>
</tr>
<tr>
<td>Arts &amp; Culture Centres</td>
<td>9,547,000</td>
<td>9,547,000</td>
<td>9,547,000</td>
</tr>
<tr>
<td>Revenue</td>
<td>4,675,000</td>
<td>4,675,000</td>
<td>4,675,000</td>
</tr>
<tr>
<td>Arts &amp; Culture Centres - Net</td>
<td>5,750,000</td>
<td>5,750,000</td>
<td>5,750,000</td>
</tr>
<tr>
<td>NL Arts Council</td>
<td>5,115,000</td>
<td>5,115,000</td>
<td>5,115,000</td>
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<tr>
<td>The Rooms Corporation of NL</td>
<td>6,581,700</td>
<td>6,095,000</td>
<td>6,095,000</td>
</tr>
<tr>
<td>NL Film Development Corp</td>
<td>749,000</td>
<td>707,000</td>
<td>707,000</td>
</tr>
<tr>
<td>National Sites Development</td>
<td>520,000</td>
<td>775,000</td>
<td>275,000</td>
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<tr>
<td>Heritage Foundation of NL</td>
<td>515,000</td>
<td>496,000</td>
<td>496,000</td>
</tr>
<tr>
<td>Special Celebrations and Events</td>
<td>685,000</td>
<td>432,000</td>
<td>1,001,000</td>
</tr>
<tr>
<td>NL Film Development Corp (Capital)</td>
<td>4,985,000</td>
<td>4,500,000</td>
<td>4,500,000</td>
</tr>
<tr>
<td>Gross</td>
<td>59,532,300</td>
<td>(1,545,000)</td>
<td>(3,936,000)</td>
</tr>
</tbody>
</table>

Budget Summary

Tourism and Culture Branch
Driving the Trade and Investment Agenda

- Strategically positioning the province and industries among key markets and sectors
- Reducing barriers and creating the conditions for more liberalized global trade
- Employing an Integrative Trade Framework
  - Joint Ventures and Strategic Relationships
  - National and International Expert
  - Foreign Direct Investment
  - Sourcing and Outsourcing
  - Canadian Direct Investment Abroad

Collaborative approach among branches, departments, government and industry to achieve results.

Newfoundland Labrador
Business, Tourism, Culture and Rural Development
Trade Policy

Trade and Investment Branch
Trade Policy Mandate

- Advance and represent the province’s interests in the negotiation of, or amendments to, domestic and international trade agreements.

- Provide strategic trade policy advice/analysis and direction in managing:
  - Trade agreement/negotiations
  - Investment agreements
  - Investment disputes
  - All trade policy related files across government

- Consult and advance the interests of key provincial stakeholders (crown agencies, government funded bodies, industry associations etc.).
Trade Policy Division Staff

**Director – Jeff Loder**
- Chief negotiator for domestic/international trade agreements
- Oversees the analysis and preparation of trade policy advice
- Oversees all trade policy related matters across government

**Manager of International Trade Negotiations – Mark Janes**
- Deputy Chief Negotiator
- Assists Director in all duties

**Manager of Internal Trade – Richard Squires**
- Manages Agreement on Internal Trade (AIT)
- Research and Analysis

**Two Analysts (one shared position)**
- Research and analysis

Trade and Investment Branch
Domestic and International Trade Responsibilities

**Domestic Trade Agreements:**
- Agreement on Internal Trade (AIT) and the Atlantic Procurement Agreement (APA)

**International Trade Agreements:**
- Bilateral and Multilateral FTAs
  - TPP, CETA, NAFTA etc.
- World Trade Organization (WTO)
- Foreign Investment Promotion and Protection Agreements (FIPAs)
Canada-European Union Comprehensive Economic and Trade Agreement (CETA)

- Canada’s most comprehensive and ambitious trade agreement.
- Ratification and Implementation in 2017.
- Major economic and policy implications for NL.

Trade and Investment Branch
Trade Policy – Top Priorities

- AIT re-negotiations
- $400M Fisheries Investment Fund in CETA
- $25M Ferry Duty Remission Application
- CETA Ratification and Implementation
- TPP Ratification
Trade Policy – Upcoming Events

- AIT Offer of Exceptions Dec 18th, 2015
  5 week long negotiating rounds between January and March. Ministerial Meeting January 25-26 in Toronto.

- COF deadline to conclude AIT negotiations March, 2016

- Ratification of TPP in 2017 (estimate)

- Entry into force of CETA Spring, 2017 (estimate)

Trade and Investment Branch

Newfoundland
Labrador

Business, Tourism, Culture and Rural Development
Mandate

Support economic development and diversification through increased international trade:

- Establishing and maintaining international trade networks and relations
- Increasing clients awareness and understanding of global markets, opportunities and challenges
- Promoting the province and its industries within selected markets
- Working with provincial and national entities to increase SME business supports and trade development efforts
International Business Development Staff

Carolann Harding – Director
- Leads IBD Division, oversees the IBD activities and international events, management committee member of International Business Development Agreement (IBDA)

Kelly Day – Manager
- Manages IBD Staff and assists director

IBD Staff
- 10 - IBD Officers - (2 vacant) Research, analysis and helping clients navigate through global market uncertainties to identify trade opportunities
- 1 - IDO I
- 1 - Clerk IV

Trade and Investment Branch
Core Business

Stages of Development
- Export Curious
- New to Export
- Established Exporters

Export Business Consulting
- Client counselling & training
- Intelligence gathering/fact finding
- Facilitating international relationships

In-Market Activities
- Matchmaking & Networking
- Leading trade missions & trade shows

Manage Events Calendar

Trade and Investment Branch
Client Profile

IBD division supports up to 100 clients annually.

IBD clients include businesses from a wide variety of growth sectors. The top 5 are:

- Ocean Technology
- Aerospace and Defense (50)
- Information & Communications Technologies (ICT)
- Industrial Supply and Services
- Professional Services

In 2014/2015, 75% of the companies the IBD division assisted were service producing firms.
Level of Activity
From April 1, 2014 – March 31, 2015
- 25 missions with 127 industry participants
- 52 community outreaches, presentations, seminars, newsletters

Managing and leveraging trade alliances such as MOU’s, IBDA, CAP and SEUS-CP.

Priority Markets
- United States
- European Union
- China/Asia
- Brazil
- Caribbean
Indicators

IBD Trade Missions

• Over 70% of companies met their mission objectives

• 1/3 of participants anticipated immediate/near term sales

• 75% of companies plan to return to market

• 9 out of 10 companies have overall satisfaction with participating in trade missions

Trade and Investment Branch
IBD Market Research
Comprehensive analysis of approximately 500 NL companies that will be used to inform a long-term trade and investment strategy for international business development.

International Business Development Agreement (IBDA) Renewal
IBDA is a pan-Atlantic federal-provincial agreement designed to increase trade activities. The new $10 million agreement is currently being negotiated for an additional 5 years beginning April 2016.

Events
- Multi-Sector Mission (TBC) United Kingdom March 2016
- Council of Atlantic Premiers, Europe June 2016
- Harnessing our Oceans Wealth, Ireland June 28-30, 2016
Promote inbound Foreign Direct Investment focusing upon:

- the expansion into the province of national and foreign-owned enterprises

- significant expansion of NL-based businesses to support national/international markets

- increasing the flow of external equity investment (private equity, venture capital, etc.) into NL high-potential firms
Investment Attraction Staff

Director – (Vacant)
- Oversees IA team in promoting the province within selected markets/industries
- Primary contact for prospects
- Liaison with Business Analysis Division in deal development

Manager, Major Industries and Logistics (Fraser Howell)
- Lead on major industrial opportunities and primary liaison with regional offices
- Responsible for trade-related transportation initiatives (e.g. air access)

One Investment Attraction Lead (Vacant)
- Research, ongoing investment promotion and key prospect support
Key Pillars

- Attract new entrants to expand the capacity and drive growth of primary sectors (e.g. Oil and gas), and to increase global competitiveness.

-Accelerate diversification by attracting firms and investment that complement local firms within sectors such as Ocean Technology, IT, Aerospace and Defense, among others.

- Work with communities, municipalities and other province-wide stakeholders to advance regional opportunities.
Activities

- Promotion at major shows and events
- Coordinate inbound investment missions
- Support IA efforts of others across Govt. (e.g. mining)
- Advice and counselling to prospects
- Coordinate partners and stakeholder engagement (i.e. Memorial, MI, Nalcor, RDC, ACOA, etc.)
- Facilitate strategic investment initiatives (i.e. VC funds, Air Access projects)
- Work with Brand on cross-government marketing strategy

Trade and Investment Branch
Venture Newfoundland and Labrador

- $10M into the $15M Venture Newfoundland and Labrador fund
- Jointly established by GNL, BDC and NLAN (accredited angel investors) - Managed by Pelorus Venture Capital Ltd
- Seed stage fund focused largely on pre-commercial companies needing help to gain early market traction and attract next stage external investment.

Build Ventures

- $10M into the $65M Build Ventures fund comprising the four Atlantic Provinces, BDC, EDC, TVC and private investors - Managed by GPs Patrick Keefe and Rob Barbara
- Focus on early- to mid-stage companies with commercial traction and requiring capital to scale.
Feedback from Prospects

- Long-term economic and political stability
- Proximity to major resource projects
- Comprehensive R&D supports
- Critical mass of infrastructure, capabilities and geographic location for selected forms of innovative development (i.e. a hub for arctic activity)
- Business-friendly and responsive network of government, academic and industry stakeholders
- Competitive financial and tax incentives
Priority

- Advance mature investment prospects (IA and Oceans)
- Investment Attraction marketing strategy (BTCRD/Brand)
- Coordination on IA with other Departments
Marketing – Mandate

- Provides leadership, direction, and coordination of all marketing activities including:
  - Promotion of the department’s programs and services
  - Positioning the province nationally and internationally as an attractive place to do business
  - Promotion of business and economic development
  - Provides cross divisional marketing support for the department with the exception of tourism
Marketing Division Staff

Sheila Fudge - Director
- Provides leadership, direction and coordination of marketing activities.

Two - Marketing and Production Coordinators
- Leads administration and execution of all trade events, shows, and advertising
- Budget preparations and related monitoring activities
- Development, production and planning for all marketing materials
- Specialized research and intelligence

Marketing Specialist
- Website administration and development
- Supports marketing activities
- Provides technical support

Market Development Officer (Vacant)
Activities/Support Functions

Marketing Management

Websites

Shows, events and advertising

Departmental Publications and Accountability Reports

Presentation Decks

Trade and Investment Branch
Local Shows and Events

Key Industry Shows

- Aerospace and Defence Industry Association of NL
- Canadian Manufacturers and Exporters
- Municipalities NL
- NL Aquaculture Industry Association
- NL Environmental Industry Association
- NL Organization of Women Entrepreneurs
- NL Oil and Gas Industries Association

- Additionally we support another 10 - 15 Industry events annually
Key National and International Events

- Arctic Technology Conference – Copenhagen
- Nunavut Trade Show – Nunavut
- DEFSEC – Halifax
- Oceans’15 – Washington
- OMAE – St. John’s
- MASS’15 – St. John’s
- Arctic Circle Conference – Iceland

Upcoming Events

- Arctic Technology Conference, St. John’s, October 24-26, 2016
International Campaigns

- The Arctic Path
- World’s Cold-Ocean Laboratory
- Canada’s Front Line

Provincial Campaigns

- We’re IN.
- We’re Hands On
- Lean Manufacturing

Trade and Investment Branch
• Supplier Development
• Investment/Business Attraction in Collaboration with Brand
• Innovation