



THE INFORMATION AND COMMUNICATIONS TECHNOLOGY COUNCIL

The impending Hyper-connected & Collaborative Economy Implications on R&D policy

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OUTLINE

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CONTEXT

The reshaping of traditional markets through hyper-connectivity and collaboration is challenging every aspect of incumbent businesses and has left many policy makers searching for answers

From consumer protection, labour, to competition matters the list of policy issues is far reaching

At the heart of these innovative times is research and development that empowers entrepreneurs to explore new Intellectual Properties (IP), which is the essence of any high performing economy



DIGITAL ECONOMY INFLUENCERS



1. Emerging technologies (SMAAC, IoT, IIoT, others)
2. Rapid growth sectors and business models
3. Cyber vulnerabilities and safeguards
4. Consumer issues
5. Competition matters
6. International trends

GROWTH SECTORS

Financial Services



Advanced Manufacturing & Robotics



Retail



Cybersecurity



Health



Biotechnology & Pharmaceuticals



Connected Transportation

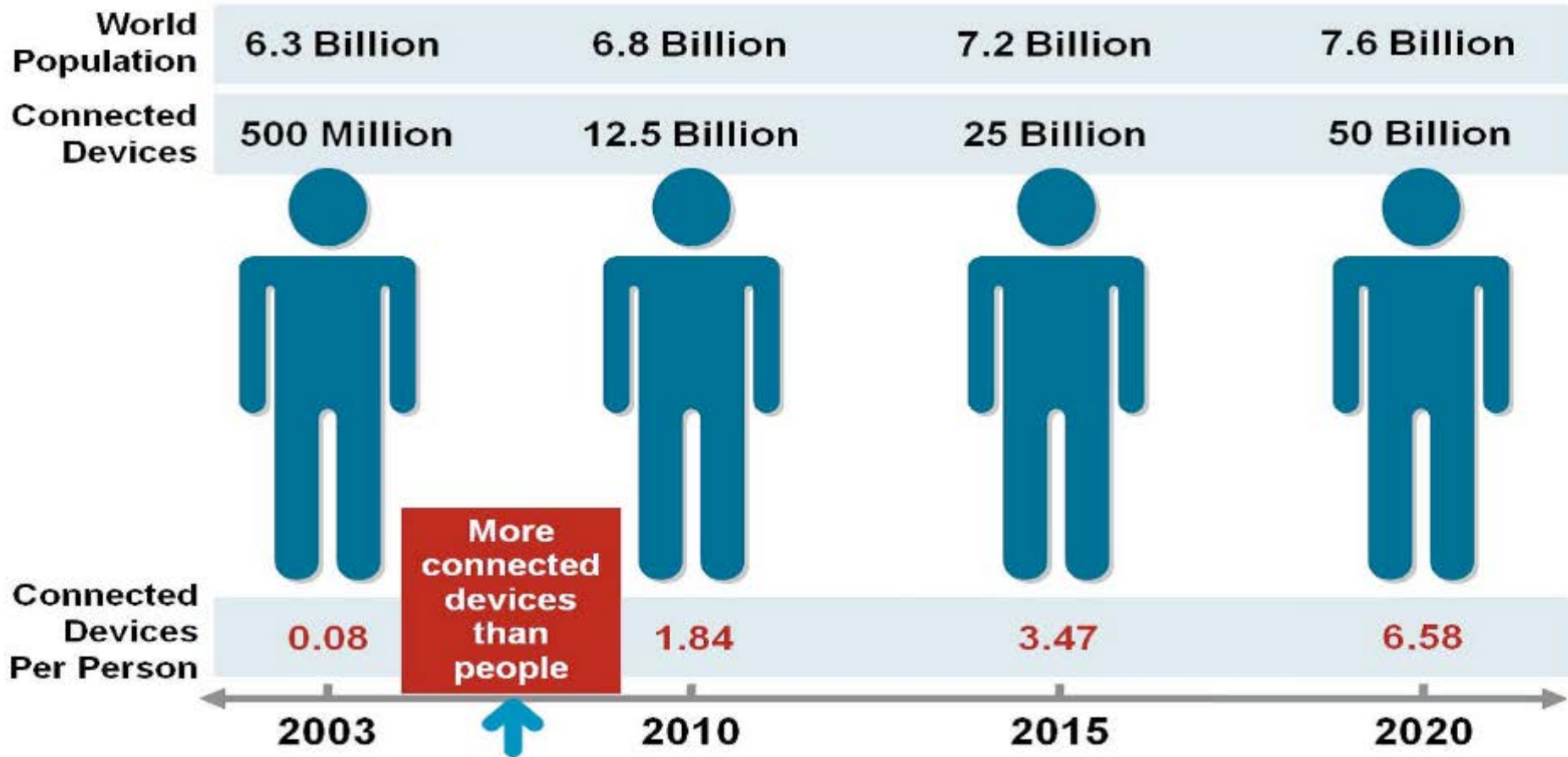


Smart Cities



TECHNOLOGY TRENDS BY 2020

IoT, \$9 Trillion Global Economy - IDC



DIGITAL LABOUR NEEDS IN CANADA

HIGHLIGHTS

We face a growing gap between the demand for, versus supply of, ICT talent and skills. Hiring requirements in Canada are expected to reach:

182,000 by 2019

5 occupations will be in strong demand.



Information System Analysts & Consultants



Computer Programmers & Interactive Media Developers



Computer & Information Systems Managers



Software Engineers & Designers



Graphic Designers & Illustrators

The demand-supply imbalance will affect all provinces, and could reach over:

76,300	Ontario
49,600	Quebec
20,900	British Columbia
17,300	Alberta
4,000	Manitoba
3,900	Saskatchewan
3,800	Newfoundland and Labrador
3,200	Nova Scotia
2,200	New Brunswick
1,500	Prince Edward Island



R&D POLICY TAXONOMY

- R&D FDI Policy:
 - Innovation Policy
 - Inward policy
- Incentives for attracting R&D FDI:
 - Fiscal and financial instruments
 - Availability of skilled workers
 - Cost of labour
 - Size of the intended market
 - IP rights regime
 - Political climate and quality of life
 - Administrative processes



TOP 10 TARGET COUNTRIES FOR FDI

- Despite uncertain global economic outlook in the short-term, Canada continues to rank as one of the top destinations for investment

Top 10 Target Countries for FDI

Country ranking	2013	2014	2015
 United States	1	1	1
 China	2	2	2
 United Kingdom	8	4	3 ▲
 Canada	4	3	4 ▼
 Germany	7	6	5 ▲
 Brazil	3	5	6 ▼
 Japan	13	9	7 ▲
 France	12	10	8 ▲
 Mexico	9	12	9 ▲
 Australia	6	8	10 ▼

Source: 2015 FDI Confidence Index,
AT Kearney



Q & A

For more information, visit:

www.ictc-ctic.ca