

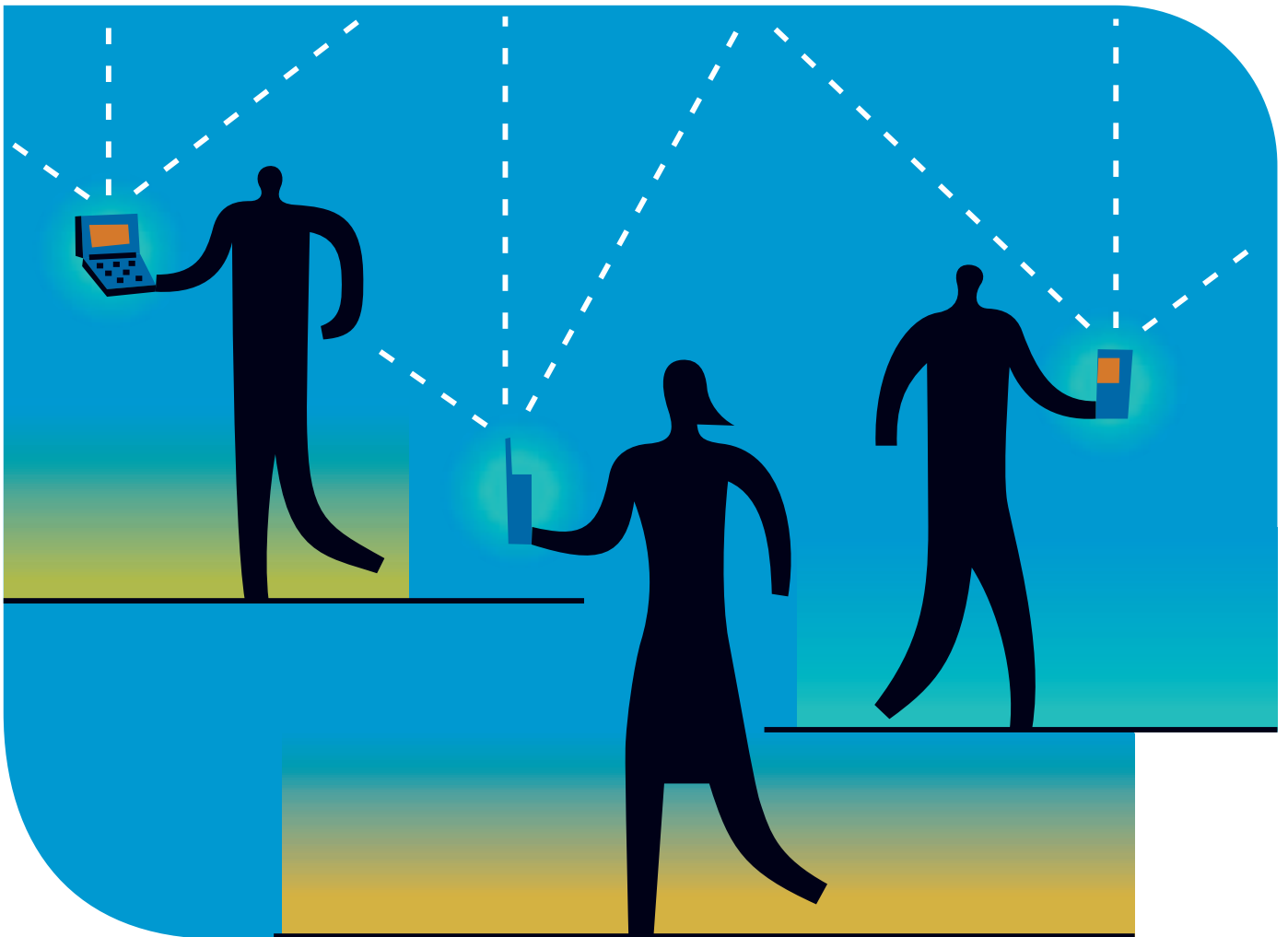


INFORMATION TECHNOLOGY  
ASSOCIATION OF CANADA



ASSOCIATION CANADIENNE DE LA  
TECHNOLOGIE DE L'INFORMATION

## 2000/2001 Annual Review



"But the nattering nabobs of negativism have it wrong. It would be shortsighted in the extreme if governments were to stop pressing ahead with the new economy policies because of the dot-com bust. The Nasdaq should no more be mistaken for the real Internet economy than mining promotions should be mistaken for iron ore . . . The wonder of the Internet economy is not that it has failed to live up to the hype, but that it has wielded such enormous influence in so little time."

Edward Greenspon, *The Globe and Mail*

# The

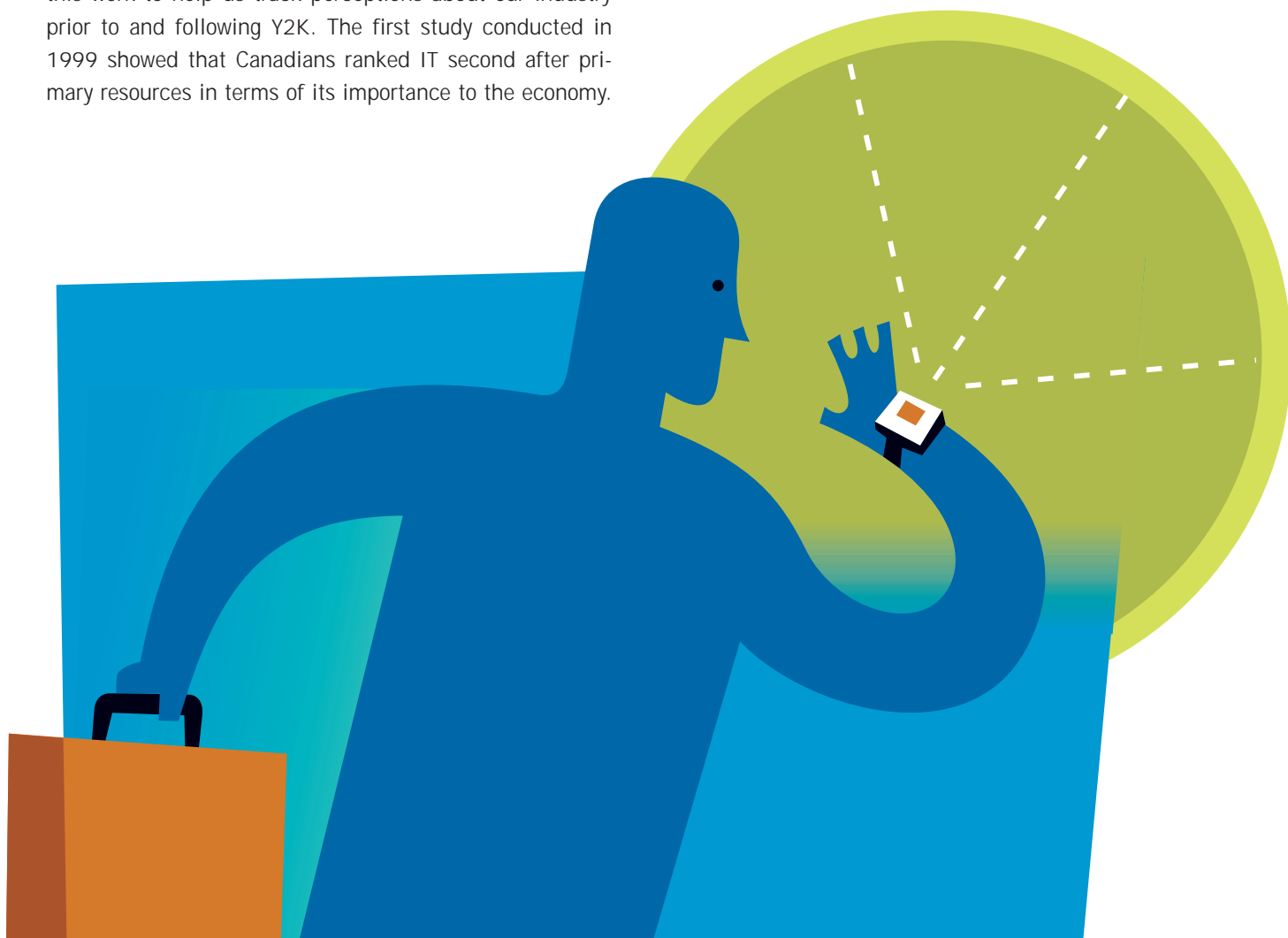
IT industry in North America experienced a dramatic reversal of fortunes, literally and figuratively, in 2000. Valuations slid, dot-coms self-destructed and an atmosphere of skepticism seized the media. Reasoned, long-range thinking about the future of the industry were among IT journalists and industry watchers' musings. And, as a result, reputation management became a key preoccupation of the Information Technology Association of Canada (ITAC) as we actively countered the negativity with our own projections for growth and a return to prosperity.

Recent data suggests that, in spite of the poor media climate, the public perception of our industry remains optimistic. For three years now, ITAC has commissioned a study, *Attitudes of Canadians Toward the Information Technology Industry*, from IDC Canada. Initially, we requested this work to help us track perceptions about our industry prior to and following Y2K. The first study conducted in 1999 showed that Canadians ranked IT second after primary resources in terms of its importance to the economy.

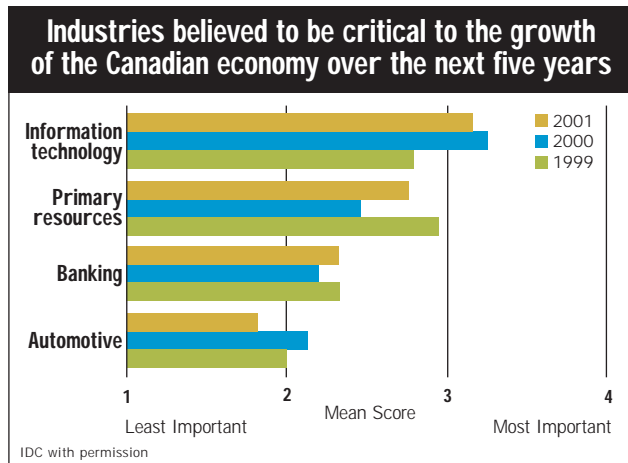
After Y2K, IT had surpassed primary resources as the most important sector in the economy.

This year the study focused on the impact of the stock market downturn on public perceptions. The results show that, while there has been some minor slippage in terms of the number of Canadians who feel that the IT industry is the sector most critical to growth, we still hold firmly to first place. The study also showed that more than 50 per cent of Canadians still believe IT is a major contributor to the Canadian economy. And more than 46 per cent believe that tech stocks will rebound after their fall over the past year.

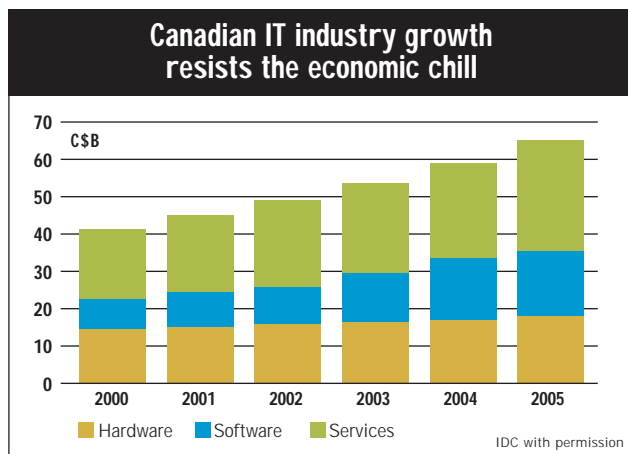
This has been a challenging period, but few who work in the industry are as pessimistic as the media reports might suggest. The Internet revolution has barely begun. Half the world isn't even wired yet. New innovations still emerge with



astounding frequency. And the industry itself still retains its capacity to surprise and amaze. The public attitude survey clearly reflects this.



Growth projections from IDC suggest that there is a solid foundation for this optimism. While its projections suggest that there will be a slowing in the growth rate from 8.3 per cent in 2000 to a rate of 7.2 per cent in 2001, IDC is predicting a return to a robust 9 per cent growth rate by 2002. The data shows that the IT industry grew 1.5 times as fast as the GDP in 2000 and is expected to grow 2.5 times faster in 2001.



Meanwhile, the work to ensure that our industry continues to grow and create new opportunities, wealth and employment has continued at ITAC.

## The Business Environment

After years of advocating the need for significant tax reform in order to foster innovation and competitiveness in Canada, we saw major victories in 2000/2001. The pre-election budget update delivered by Finance Minister Paul Martin last October strongly reflected our briefings to the

Finance Committee and to the Prime Minister's Office. The update provided substantial personal and corporate tax reform and established an aggressive target for national investment in research and development. The high-income surtax, which we viewed as a tax on knowledge workers, finally was eliminated. Personal taxation rates in general have dropped and we'll see a staged reduction of corporate income tax over the next four years.

These changes to taxation policy reflect a stronger orientation of the federal government toward the realities of a faster, innovation-driven global economy. The autumn election was fought on a variety of new economy platforms, with candidates struggling to outdo one another for photo opportunities in IT start-ups and laboratories.

The momentum from the campaign can be felt in new initiatives such as the National Broadband Taskforce, which was created to propose a strategy to link all Canadian communities with high-speed access by 2004. Both Minister Martin and Industry Minister Brian Tobin have persistently championed the need for a stronger focus on innovation and competitiveness. A major government policy paper on innovation is scheduled for release in the fall of 2001, which will establish a blueprint of ways to make Canada a more innovative nation. ITAC is a natural ally in this initiative and has several projects scheduled that will inform the dialogue on this vital issue.

In November 2000, ITAC, with support from IBM, Microsoft and Industry Canada, commissioned the Conference Board of Canada to study the linkage between IT investment and productivity growth in Canada.

The report, *IT and the Knowledge Economy*, established clearly that investment in IT is a key factor in productivity growth. The study ends any debate about this linkage and advances the policy dialogue toward new topics such as how to best accelerate the adoption of IT tools throughout the economy.

ITAC's Board of Governors has called for a stronger focus within our association on emerging IT companies. Staff have responded to this request by adjusting the ITAC fee structure to make it more attractive to emerging companies and by creating an Emerging Business Program tailored to their needs. Emerging companies have also helped to expand the range of our policy work. ITAC has collaborated with the Canadian Venture Capital Association as well as the Canadian e-Business Opportunities Roundtable to reduce the barriers to financing and listing new ventures in Canada.

One of our most recent initiatives to improve the business environment deals specifically with the physical envi-

ronment. After witnessing non-collaborative regulations come into law in other jurisdictions — which effectively place the burden for the disposal of hazardous waste materials on the IT industry — ITAC has elected to get out in front on this issue in Canada. We created an Environmental Forum for our members. Then, together with Industry Canada and Environment Canada, we hired a consultant to assess the relative feasibility of a number of alternative national schemes for extended producer responsibility for IT waste. Our objective is to be as proactive and as collaborative on this issue as possible. We want to ensure a viable balance between industry responsibility and the need to ensure a safe environment.

While we maintain a strong focus on issues in the Canadian business environment, we also recognize that our industry is undeniably global. This reality makes it imperative to focus on world trade issues and necessitates significant attention to international standards organizations. ITAC is now a formal partner with Industry Canada and the Standards Council of Canada in co-sponsoring the

Telecommunication Standards Advisory Council of Canada. We are also working to ensure ongoing consistency of international rules pertaining to the global e-business marketplace. And we work closely with the Department of Foreign Affairs and International Trade to ensure that Canadian negotiating positions in discussions at the World Trade Organization and the FTAA reflect the interests of the IT industry.

Occasionally, we have the good fortune to combine international trade relations with good fellowship. In September, ITAC hosted the International Information Industries Congress in Quebec City. We welcomed delegates from sister organizations in Europe, the United States and Japan and discussed many issues of common concern, including cyber-crime and product conformity assessment systems.

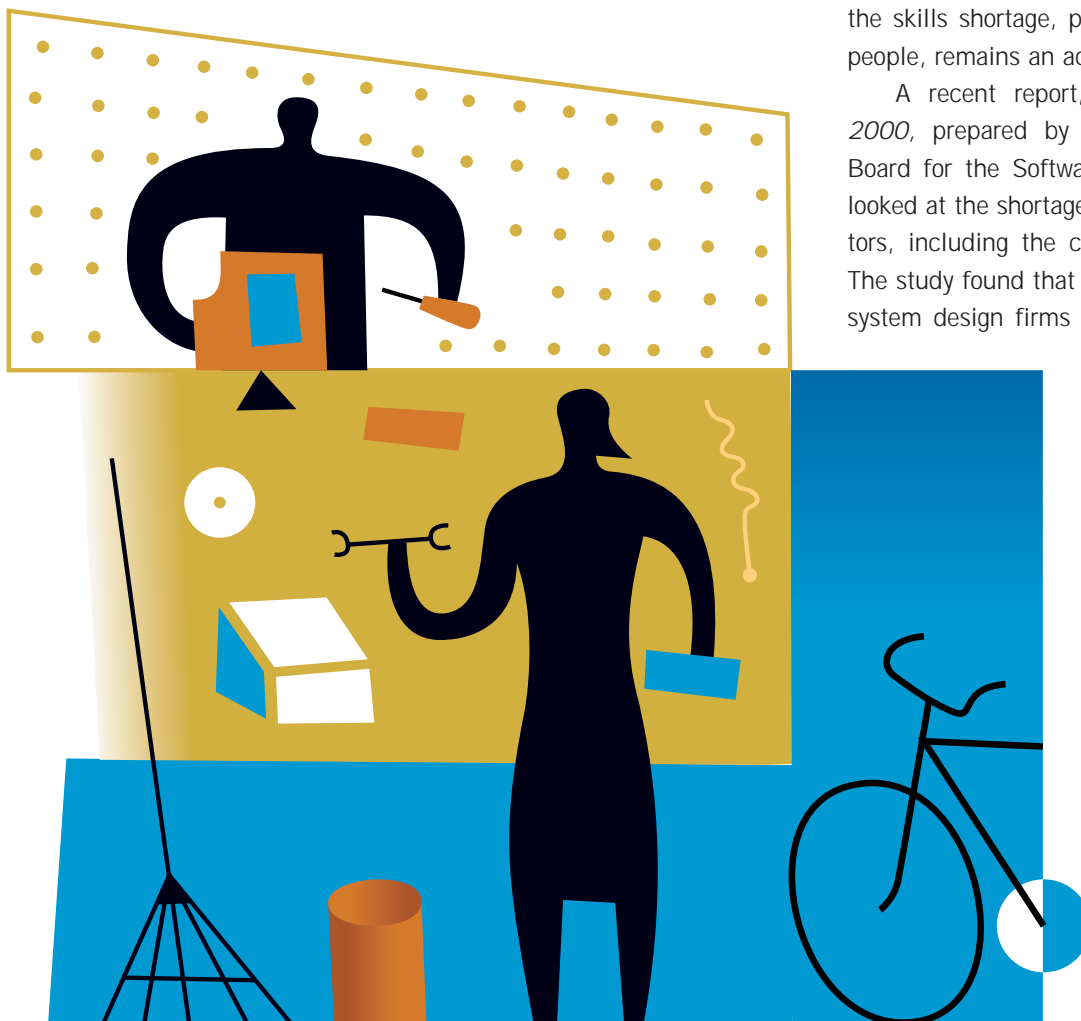
## The Skills Shortage

The single greatest impediment to the growth of the IT industry continues to be the shortage of skilled men and women. While growth in the industry has slowed somewhat and a number of layoffs have been announced, the skills shortage, particularly for highly qualified people, remains an acute problem.

A recent report, *Survey of IT Occupations, 2000*, prepared by Statistics Canada/Conference Board for the Software Human Resource Council, looked at the shortage of IT employees in three sectors, including the computer system design field. The study found that almost two-thirds of computer system design firms experienced hiring challenges

due to the high demand for qualified IT workers. It determined that if qualified people were available, computer systems design firms would not only have filled all the vacant positions, but they would have hired additional IT employees equivalent to 14 per cent of their IT workforce. While this study only examined one segment of our industry, it strongly suggests that the shortage of skilled people is growing, rather than diminishing.

Nowhere is it growing at a more alarming rate



## Job turnover and openings for IT positions at computer systems design firms

### VACANCY RATE

Job openings as per cent of total IT employment	12%
Percentage IT vacancies unfilled for four months or more	35%

### POTENTIAL NEW JOBS

Potential new IT positions created if qualified persons could be hired as per cent of current IT employment	14%
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Source: Statistics Canada, Survey of IT Occupations, 2000: Employer Survey

## Percent of computer systems design employers experiencing "a lot of difficulty" recruiting for various occupations

Software engineers	44%
Data administration analysts	38%
Electrical and electronics engineers	33%
Infosystems business analysts and consultants	31%
Systems auditors	28%
Database administrators	28%
IT training managers	26%
Computer and infosystems managers	26%
Web managers	25%
Systems security analysts	25%

Source: Statistics Canada: Survey of IT Occupations, 2000: Employer Survey

than in the areas of micro-electronics, photonics, optoelectronics, wireless and radio engineering. The eMPOWER initiative was launched by a group of companies in these fields to address the shortage of highly qualified people graduating from advanced technology disciplines in Canada. eMPOWER's surveys show that by 2005, the number of graduates in a position to enter the industry will total fewer than a third of what the industry will require. While there has been significant federal government investment in innovation and funding for organizations such as Canada Research Chairs, very little of this investment translates into the skilled resources necessary to fuel the growth of the industry. To address this, eMPOWER has called upon the federal government to invest \$500 million over the next five years to recruit the talent we need to deliver the next generation of skilled people.

ITAC lent its support, primarily in the areas of government relations and communications, to the eMPOWER initiative in February. We continue to be active champions of this campaign. We are also working closely with the Software Human Resource Council to restructure its board, stabilize its membership and ensure its financial stability.

## Electronic Commerce/Electronic Government

Throughout the past 12 months, ITAC has campaigned vigorously for the accelerated deployment of electronic commerce in all segments of the economy. Our e-business speakers bureau has addressed audiences as diverse as Canada's heavy equipment manufacturers and its fish producers.

ITAC staff also continue to play active roles in the e-Business Opportunities Roundtable. In February, the roundtable released *Fast Forward 2.0: Taking Canada to the Next Level*, which was a one-year report card on the progress we're making as an e-business-ready nation. This report showed growth from 31 to 39 per cent in terms of population accessing the Internet. Small businesses increased their e-business activity from 15 to 35 per cent. The venture capital climate improved with VC disbursements growing from \$1.7 billion in 1999 to \$2.3 billion in the first six months of 2000. The report also showed that the Roundtable's modest expectations for growth in the number of Internet-related IPOs in Canada was not achieved. It did, however, report positive changes in tax policies and indicated good progress on widening the e-business talent pool. It also reported progress on trustmarks. But the report raised alarm about lack of progress on two key fronts, Canada's global business brand and government online.

## Canada's E-report card 2000

Fast forward – progressing rapidly		Forward – progressing slowly		Pause – no progress	
Performance indicators	Progress in 2000	Performance indicators	Progress in 2000		
Consumer connectivity	>	E-business talent	>		
Business online	>	Government online			
Venture investment	>	Trustmarks	>		
Internet IPOs in Canada		Global e-business brand			
Tax policies	>>	AVERAGE	>		

Source: Fast Forward 2.0: Taking Canada to the Next Level

The slow pace of government online is a source of concern for ITAC as well. We advocated strenuously for resolution of the issues around the release of the secure channel tender. After many months of time lost, that log-jam has finally been cleared, opening access to tremendous opportunities for our members doing business with government.

ITAC's Public Sector Business Committee has been diligent in working to ensure an appropriate set of terms and conditions for doing business with government. For

example, it completed a limitation of liability framework for government contracts awarded through Public Works and Government Services Canada. It also achieved a significant review of Treasury Board's Interim Contracting Authority and moved toward extending this approach to other major user departments.

Security is a fundamental underpinning of the successful deployment of any e-business or e-government strategy. Last year, ITAC created its Cyber Security Forum to address issues of cyber-security in Canada and throughout the world. After only a few months in operation, the forum has been highly influential in Canadian public policy and in multi-lateral forums such as the G-8. This progress is significant. We have argued since 1996 that multipartite conversations about cyber-crime and cyber-security must include the voice of the industry as well as the enforcement and judicial community. That is clearly understood here in Canada by public policy makers who view the ITAC Cyber Security Forum as the voice of the industry. The forum will help to ensure a balance between the needs of the law enforcement community, the e-business community and the software and equipment vendors that serve them.

## Strengthening the Association

ITAC continues to develop its services to members and its sources of non-member-derived revenue. This year we partnered closely with Industry Canada to launch Canada's IT Week. This was a 10-day celebration of Canada's tremendous track record as the most wired country on earth. IT Week events ranged from a major provincial roundtable to the presentation of Community IT Hero Awards in cities and towns all across Canada. IT Heroes are the many men and women who, through their vision and countless hours of volunteer time, have advanced the benefits of connectivity to their communities. A list of the first annual ITAC IT Heroes is found on the inside back cover of this report. IT Week was a resounding success and plans are already under way for 2002.

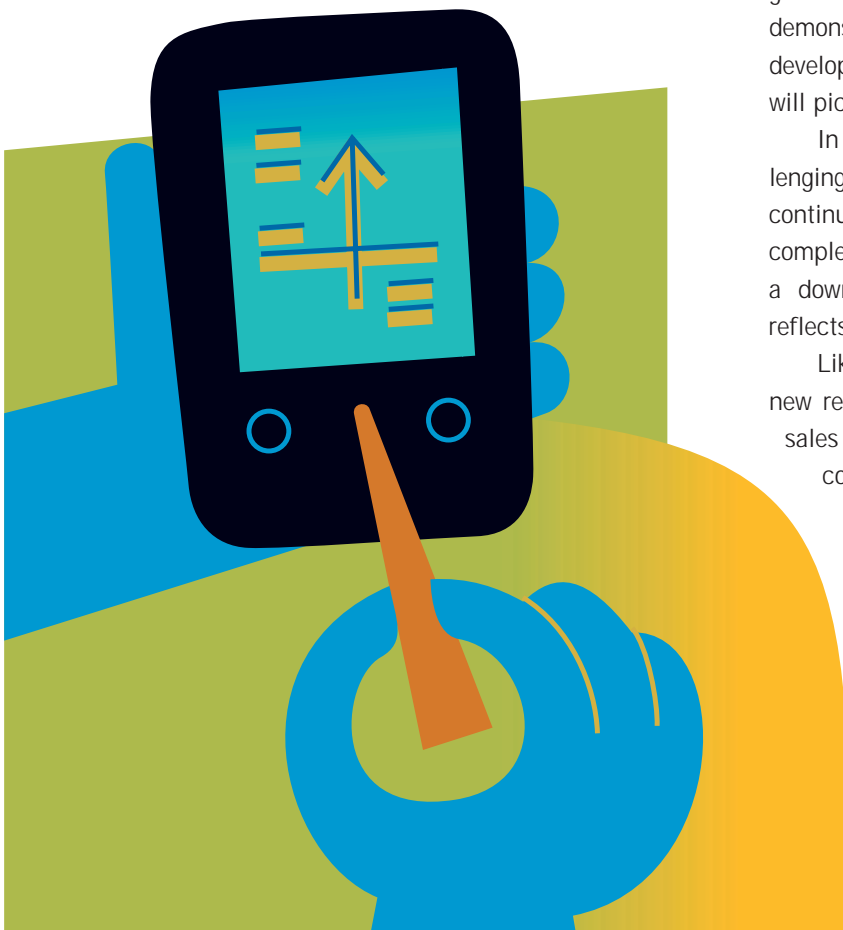
Softworld 2000, held last fall in Halifax, was also a fine strategic and financial success. It continues to be an excellent forum for deal making and partnerships. Premier John Hamm and the Softworld 2000 organizing committee were superb hosts.

ITAC also successfully concluded the delivery of the Bell/Telus Wireless Investment Fund in association with CANARIE. This program significantly advanced the progress of Canadian innovation in the wireless sector and demonstrated the value of this model for research and development. A new business, Bell Mobility Investments, will pick up where the previous program left off.

In sum, it has been an eventful and frequently challenging year for ITAC. Our ability to influence public policy continues to grow. Our ability to manage and communicate complex issues critical to the IT industry is increasing. But a downturn in the fortunes of the industry naturally reflects in the fortunes of the association.

Like many of our members, ITAC has responded to the new realities in the IT industry with a sharper focus on sales and marketing and operational matters. We are confident that the reforms we've made will position us to continue to deliver value to our members, regardless of what the future may hold. None of us can predict when tech stocks will make a comeback. But we do know that whatever the fortunes of our industry, ITAC will be there to serve it and foster its growth.

BOB MORINE  
ITAC Chair 2000-2001



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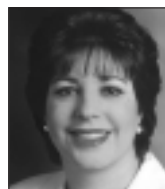
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# Canada's Community IT Heroes

The Information Technology Association of Canada (ITAC), in conjunction with Industry Canada, created the Community IT Hero Award to recognize individuals who have assisted their communities in a significant way through the use or application of information technology (IT). This awards program had the grassroots objective of getting communities involved in IT Week, by identifying and selecting heroes who have made a significant difference in the lives of people in their communities. Below is a list of Canada's Community IT Heroes:

## **INNOVATIA INC.**

Saint John, New Brunswick

## **JIM HAYWOOD**

Principal, Inglis Street Elementary School, Halifax, Nova Scotia

## **JOHN EHINGER**

Teacher, Agassiz Adult Education Centre, Beausejour, Manitoba

## **KNOWLEDGE INDUSTRY TASK FORCE (KITF)**

Fredericton, New Brunswick

## **LLOYD ROCHE**

Computer Consultant, Evergreen School Division, Gimli, Manitoba

## **MARY GRAHAM**

Librarian, Hapnot Collegiate, Flin Flon, Manitoba

## **LINDA COBHAM**

Teacher, M. Gerald Teed Elementary School, Saint John, New Brunswick

## **MERV TULLOCK**

Teacher/IT Coordinator, Rankin Inlet, Nunavut

## **MIKE CUMMINGS**

Teacher, Grade 6 Inglis Street Elementary School Halifax, Nova Scotia

## **MIKE KUSYK**

Teacher, Dr. F.W.L. Hamilton School, Winnipeg, Manitoba

## **NB EASTER SEALS MARCH OF DIMES**

Fredericton, New Brunswick

## **NORMAN LEE**

Volunteer, Aboriginal Community Cyber Centre, Winnipeg, Manitoba

## **ORIN DUREY**

Teacher, Amitnaaq School, Baker Lake, Nunavut

## **PAM CANDLISH**

Webmaster, Kenilworth, Ontario

## **PAUL DOYLE**

Teacher, Vincent Massey Collegiate, Winnipeg, Manitoba

## **RICHARD KOROTASH**

Teacher, Hapnot Collegiate, Flin Flon, Manitoba

## **RUDY NIKKEL**

Teacher, Landmark Collegiate, Landmark, Manitoba

## **SHELLEY RINEHART**

Electronic Commerce Centre, Saint John, New Brunswick

## **STEPHEN IBARAKI**

Head of Research, Capilano College, Vancouver, British Columbia

## **TOM COPELAND**

Service Provider, Cobourg, Ontario

## **ABILITY ONLINE**

Toronto, Ontario

## **ANJA HAMAN**

President, Wired Woman Society, Vancouver, British Columbia

## **ALAN BEILMAN**

IT Coordinator/Teacher, Joseph H. Kerr School, Snow Lake, Manitoba

## **APTICA**

Atlantic Provinces

## **BRIAN HARVEY**

Webmaster, Nova Scotia Council, Scouts Canada, Nova Scotia

## **CAROL KNOCK LOGAN**

Halifax Regional School Board Southdale-North Woodside, Nova Scotia

## **CRAIG WHITE**

Avalon East School Board, Newfoundland

## **DON WHITTY**

Mosaic Technologies, Miramichi, New Brunswick

## **EEL GROUND FIRST NATION SCHOOL**

## **DR. JANE FRITZ**

Professor and Dean, Faculty of Computer Science, UNB Fredericton Campus, New Brunswick

## **TANIS CLAYTON**

Teacher, Frontenac School, Winnipeg, Manitoba

## ITAC Committees & Forums

Public Sector Business Committee  
Communications Industries Forum  
Human Resources Forum  
International Affairs Forum  
Legal Affairs Forum  
Sales & Marketing Forum  
Tax & Finance Forum  
Cyber Security Forum  
Environmental Affairs Forum  
Communications Advisory Council

## ITAC Interest Groups

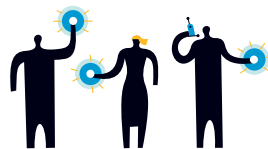
Consultative Committee Telecommunications  
Customs  
Electronic Commerce  
Intellectual Property  
International Electro-Technology  
Joint Technical Committee  
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