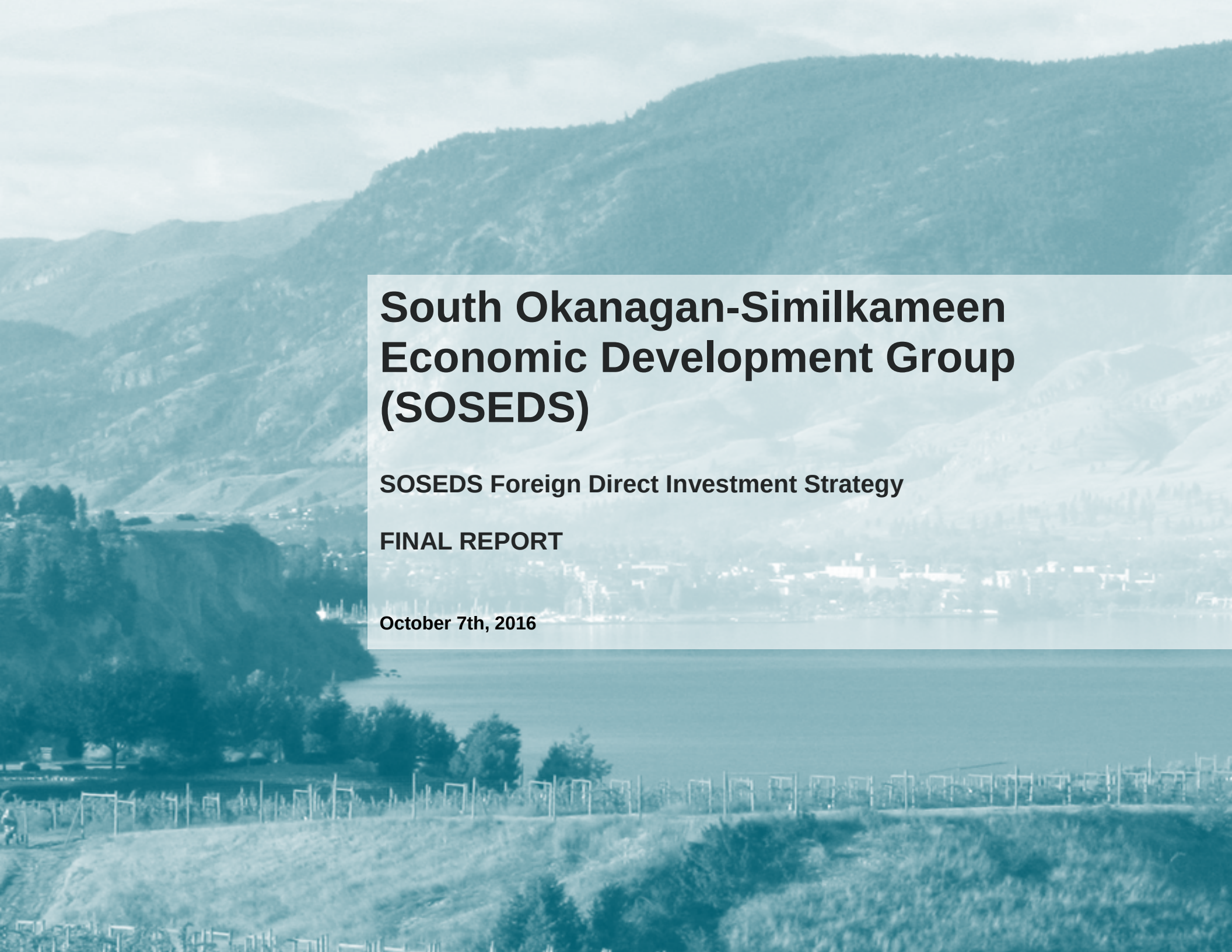


South Okanagan-Similkameen Economic Development Group (SOSEDS)

SOSEDS Foreign Direct Investment Strategy

FINAL REPORT

October 7th, 2016

Contents

1 Approach

The purpose of this project was to provide the South Okanagan – Similkameen Economic Development Group (SOSEDS) with an investment attraction strategy that achieves two main objectives:

- Provides a focused, strategic approach to attracting investment based on local strengths and advantages
- Establishes a framework for how to accomplish this regionally with its partners

Figure 1 outlines the various steps the project team undertook to accomplish these goals. An important starting point was to better understand the local and regional economy of the South Okanagan area. An overview of foreign direct investment trends at a global and domestic level was conducted. The impact of free trade agreements was also examined, and a competitive analysis completed for the local area.

Starting with the sectors provided by SOSEDS (Agriculture, Grape and Wine, Advanced Manufacturing, Clean Technologies, Bio-products, and Food Processing), the team worked to refine them into a focused approach. Stakeholder consultation was conducted with community and business leaders. This included professionals that work in the investment attraction field from the public and private sectors.

The project team completed many interviews and site visits in the area. The findings from the engagement process helped to validate the data analysis. This provided the means to connect the local strengths and assets to the target industries under examination. It also allowed different opportunities to be identified, and for the team to better understand the challenges in the area. These understandings informed key target industry opportunities prioritized by the greatest level of potential.

Strategic Directions to support pursuit of these opportunities and assist in creating the organizational framework needed were developed. Target Sector Profiles were created as investment attraction tools to guide staff and partners in directing initial outreach to target audiences. Action plans with team leads, partners, priority levels and resources were developed to assist SOSEDS with implementation. A system for performance measurement was identified, and recommended metrics suggested to support tracking and monitoring results.

FIGURE 1: STEPS IN THE PROJECT APPROACH

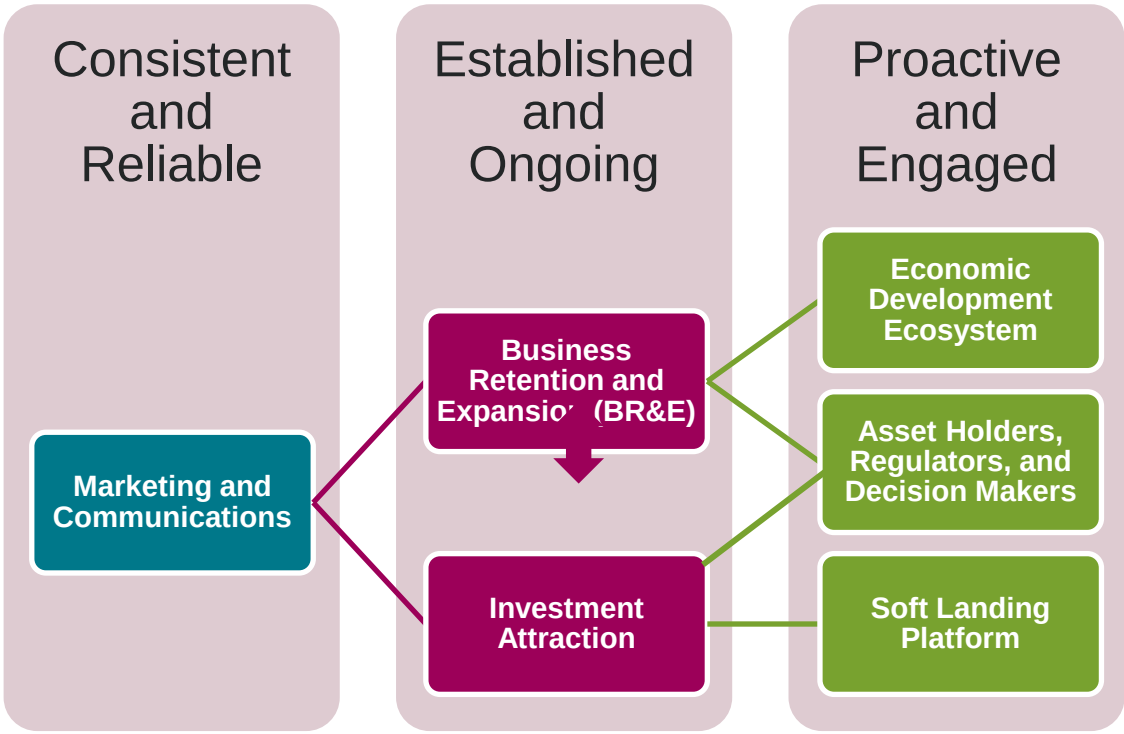
2 Investment Attraction Foundations

2.1 Setting the Stage

In its most basic form, economic development is about how communities (and their representatives) can take specific, sustainable actions over a period of time to improve their economic wellbeing and standard of living. Three types of economic development generally underpin these activities, and have developed over time: investment attraction, business retention and expansion, and entrepreneurship.

In order for SOSEDS to achieve its goal, it must ensure that all of its regional partners are coordinated effectively. This means that some foundational aspects need to be in place and mutually adopted. The diagram in Figure 2 highlights how the different components of economic development feed into each other. In order to promote the South Okanagan region as a unified group, marketing and communications must be consistent and reliable across all partners – everyone must be using the same messaging and driving contacts back to the same source.

FIGURE 2: ECONOMIC DEVELOPMENT FOUNDATIONS DIAGRAM



Further, investment attraction and business retention and expansion programming need to be formally established and ongoing in the various communities being served. This can be accomplished by one organization or by multiple organizations working in a seamless and coordinated manner. Finally, it is important all of the stakeholders in the broader network of economic development service delivery are operating proactively and are actively engaged with each other. This includes municipal and regional regulators and decision makers (including senior levels of government). Ensuring that your local industries, property owners, realtors, development community, and service organizations are actively supporting the community's economic development goals is also a critical component to successful investment attraction, as it projects an image of collaboration and unity under common goals to the prospective investor.

2.2 The Lead Generation Network

Nearly every area has an economic development ecosystem that is comprised of various people and organizations that support industry, business expansion or attraction, entrepreneurship, and workforce development. A key consideration for establishing a centralized investment attraction initiative, or program is determining where it can bring value, how it can avoid duplication, and what role it will play in the broader service delivery network.

A lead generation network exists in Canada. It includes various actors from federal and provincial governments, regional groups, municipalities and regions, private sector consultants, Industrial, Commercial, Institutional Realtors, and site selectors (see Figure 3). The lead generation network drives leads to specific areas for information that contain some form of competitive advantage that in turn can meet the potential investor's needs.

This network also includes local industries that also have various connections with the different actors in the network. As seen in the diagram, SOSEDS, as a regional coordinator of investment attraction activities is at the centre. Adopting a proactive, as well as a reactive approach to investment attraction is important. In order for SOSEDS to take an active role, it will require a strong understanding of what each sector and industry's competitive strengths are. It will also mean that strong relationships are developed and maintained with the lead drivers in the network.

The approach mentioned above will allow SOSEDS to drive initiatives from the centre out, by leveraging the resources the network provides. It means proactively seeking touch points with potential investors that are active in the target industries identified in this report. Connecting this back to local opportunities and benefits to a prospective investor is critical to successful attraction.

FIGURE 3: SOUTH OKANAGAN – SIMILAKAMEEN LEAD GENERATION NETWORK

3 Findings and Understandings

3.1 Investment Positioning

Penticton, Summerland, Osoyoos, Oliver, Penticton Indian Band, and the Osoyoos Indian Band (all located within the South Okanagan Region), were reviewed by their demographic and economic profiles in order to compare their potential to attract investment. Competitive advantages, target sectors, development charges, and tax rates were examined for each. This information shows the difference between the communities. This helps to identify the strengths and weaknesses of the various sectors within the region. It also assists in showing their comparative position for investment attraction potential.

Figure 4 provides an overview of the key information contained in this table. Detailed information can be found in the Technical Report that accompanies this document. The table below highlights the general competitiveness by population, tax rate, development charges, general industry concentrations, and previously identified opportunities for each of the six communities. This section provided an examination of previous strategies and previously identified opportunities. This served as a starting point for the project team and were derived from the various reports and initiatives available through the different communities (for example, economic development websites, promotional materials, strategies and plans).

FIGURE 4: KEY TAKE-AWAYS FOR EACH OF THE SIX COMMUNITIES

Community	Population	Development Charge Competitiveness	Tax Rate Competitiveness	Current Investment Opportunities and Target Sectors From Existing Documents Reviewed
Penticton	Increase by 3%	Lowest commercial and industrial development change	Falls in the middle	Highest number of businesses in advanced manufacturing and clean-tech sub-sectors Targets: healthcare and wellness, manufacturing, and agritourism.
Summerland	Increase by 4.2%	Falls in the middle	Lowest tax rate for major industrial	Highest number of businesses in the bio-products sub-sector Targets: value-added agriculture, R&D, manufacturing
Osoyoos	Increase by 2%	Highest commercial and industrial development change	Lowest tax rate for light industrial and business/other	Targets: value added wood production, agri-food and wine production, advanced manufacturing (and aviation)
Oliver	Increase by 9.8%	N/A	Lowest farm tax rate	Highest number of businesses in agricultural sub-sector Targets: agri-tourism
Penticton Indian Band	Increase by 13.4%	N/A	Falls in the middle	Targets: construction and forestry
Osoyoos Indian Band	Increase by 6.4%	N/A	High rates in all categories but not the highest	Targets: Residential and industrial land development.

Of note, none of the communities experienced a population decrease. The largest population increase was in the Penticton Indian Band (13.4%) and the smallest increase was in the town of Osoyoos (2%). Only three of the six communities have commercial and industrial development charges, of which the city of Penticton has the lowest. In terms of tax rates, Summerland has the lowest rate for major industrial, while Osoyoos has the lowest light industrial and business/other rate. The town of Oliver has the lowest tax rate for farms. In examining both development charges and tax rates, Summerland emerges as the most competitive, falling in the lower-middle category in terms of both tax rates and development charges.

Looking at the various target sectors outlined as a starting point for this strategy, a number of observations were made relating to the number of business in the different communities:

- Penticton has the highest number of businesses related to advanced manufacturing and clean-tech
- Summerland has the highest number of businesses related to bio-products
- Osoyoos has the second highest number of fruit and vegetable combination farming
- Oliver has the highest number of businesses related to agricultural
- Penticton and Oliver have equal numbers of businesses related to viticulture (including the Naramata Bench)

Both the Penticton Indian Band and the Osoyoos Indian Band have brought their commercial and industrial land developments front and centre. The Satik^{w} Hills commercial and employment land (see definition in footnote)[1] is a critical piece of land that links the Penticton Indian Band's economy to that of the City of Penticton and the broader region. This land opens up development opportunities for existing and new establishments. The Osoyoos Indian Band's Senkulmen Business Park is the largest commercial and light industrial park in the South Okanagan[2]. These employment lands are important in supporting commercial and industrial growth in the South Okanagan region.

Important Note on Investment Attraction

This report is titled with the term Foreign Direct Investment (FDI) and is often referred to throughout the document. It is important to understand that investment attracted from outside of the South Okanagan to its communities can be a good thing, and does not need to be limited to international origins. For instance, it is equally as valuable if SOSEDS explores attracting investment from Canada or the US, as it is from a firm in China or India. The emphasis should be placed on stimulating investment opportunities from targets outside of the South Okanagan that are the right fit for the

Quality of Life and relative affordability should be leveraged to attract knowledge economy companies, talent, and new comers

There is a need to expand the area's recognition beyond that of a tourism hot spot, while leveraging it as an asset to attract investment

[1] Employment Land is a technical planning term that refers to any type of land that is designated and zoned for employment purposes. Employment uses can be commercial, industrial, or even institutional and refer to places where people will typically work in retail operations, offices, warehouses, factories, stock yards, terminals, etc. The specific type of employment that is allowed is outlined in the municipality's zoning by-law.

[2] Osoyoos Indian Band (2015), Investment Opportunities. Retrieved from: http://oibdc.ca/investment.html. Accessed: July 19, 2016.

community and the investor, and that will foster sustainable growth and local benefit. We should think in terms of “Investment Attraction” and recognize that the “foreign” in this equation is something that is simply not yet local.

3.2 Stakeholder Engagement and Common Themes

The project team used the two approaches below to involve local and regional stakeholders in the creation of the South Okanagan FDI Strategy. These activities gathered perspectives from local businesses (both with and without foreign investor experience), regional organizations, and provincial government representatives. The activities used were:

- **Stakeholder Interviews** – 30 telephone interviews conducted with local business and provincial FDI stakeholders
- **Focus Group/Site Visits** – A focus group session held in Penticton with the SOSEDS Steering Committee. A series of site visits with local companies and other support organizations in the area

These discussions focused on the targets sectors, current strengths, and gaps for investment in the South Okanagan. They also included priorities and opportunities for SOSEDS to work on to attract more investment in the region. The list below contains a series of common themes that resulted from this process and is listed in no particular order. Sector specific concepts are included in the Sector Overviews (below), and found in detail in the Technical Report. These are important findings and are at the heart of many of the directions and recommendations established in this strategy.

Key Findings from Stakeholders:[3]

- A focus on sustainable investment attraction was emphasized
- Specialized target marketing should be used to reach audiences
- A cohesive and coordinated regional approach to marketing and promoting the area is needed
- Collaboration with immigration firms and those involved with foreign investors and capital is encouraged
- The Summerland Research and Development Centre is a prime asset that should be leveraged appropriately
- Penticton Airport is a key asset for attracting investment, accessing skilled talent, and promoting business growth
- Outmigration of youth and labour, spousal employment opportunities, lack of affordable housing, and land supply issues are serious challenges
- Collaboration on investment attraction efforts with Penticton and Osoyoos Indian Bands to support and leverage success is essential
- Increasing municipal investment readiness and economic development preparedness is necessary for success

[3] These findings appear randomly and in no particular order or ranking

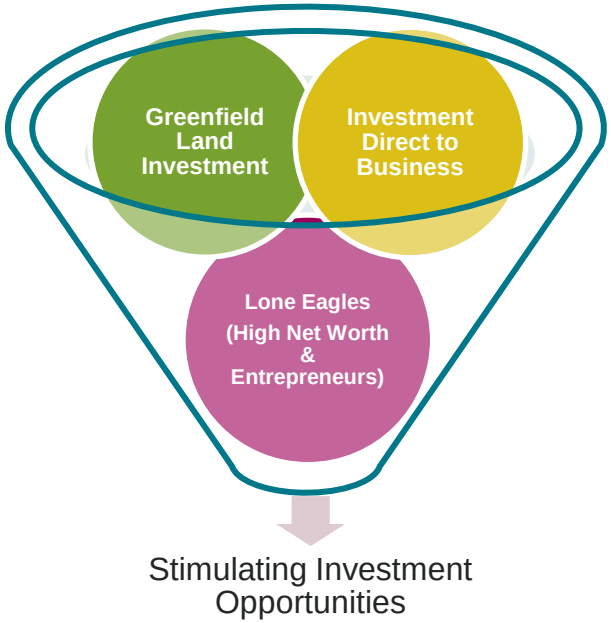
- Mixed perspectives were expressed around Asian FDI; however, many investments have been made by Chinese groups in Wine and Agriculture
- Investment has been occurring through relocating entrepreneurs and direct to business through trade/export relations

From the research and conversations held with stakeholders (identified in brief above) three distinct approaches to investment attraction emerged:

- Greenfield land development investment opportunities
- Investment directly to business opportunities
- Attracting entrepreneurs and high net worth individuals

The diagram in Figure 5 highlights how these three approaches fit within a sales funnel to result in stimulating investment opportunities. Each of the strategic approaches represents a different way that an investment can materialize. It also underlines the type of business "approach" that should be considered when planning the target sector or type of investor to speak with.

FIGURE 5: STRATEGIC APPROACHES FOR SOSEDS INVESTMENT ATTRACTION



For example, attracting a company that can develop new commercial products from bio-products in the grape and wine industry is likely to require a Lone Eagle approach. In this case, SOSEDS will need strong relationship building and networking in research and innovation circles. The staff who are responsible for attracting the investment and promoting the opportunity will need to gain industry knowledge and have a detailed understanding of the local economy and what assets are needed by the target investor in order to support a location consideration. Once a suitable entrepreneur is identified and an appealing value proposition developed, the next step in the process begins which includes touring the area and making connections.

Another example is a greenfield land opportunity where development lands are available and are ready for purchase or construction. In this case, SOSEDS representatives should have a strong relationship with local land owners and regulators. This is where an investor is looking to set up operations in a new building they own, lease, or a combination of the two.

Regardless, it is important to recognize that the target sectors under review in this report may have a single approach, or multiple strategic approaches that will be of benefit to attracting investment. In the following sections, these approaches will be taken into consideration when finalizing where SOSEDS invests its resources and what types of activities are recommended.

4 Targets and Directions

Economic development organizations have limited resources. Because of this, every effort should be made to focus their investment attraction activities. MDB Insight's Industry Targeting Decision Tree model (see Figure 6) was used to help narrow SOSEDS approach.

The model began by taking stock of the local industries and filtering them by their local specialization and assessing their growth potential. Local assets that support business growth were then evaluated for their level of benefit. Following this, local stakeholder intelligence (gained through the interview process and community visits) was applied to ground truth the cumulative findings. Outcomes were then assessed to establish the industry's opportunity potential as an investment attraction target.

When examining the outcomes, it became clear that the Agricultural Sector was at the centre of the majority of the opportunities identified for investment attraction. In addition, the research findings showed that four of the sectors being investigated overlapped – Agriculture, Food Processing, Grape and Wine Production, and Bio-products.

FIGURE 6: INDUSTRY TARGETING DECISION TREE

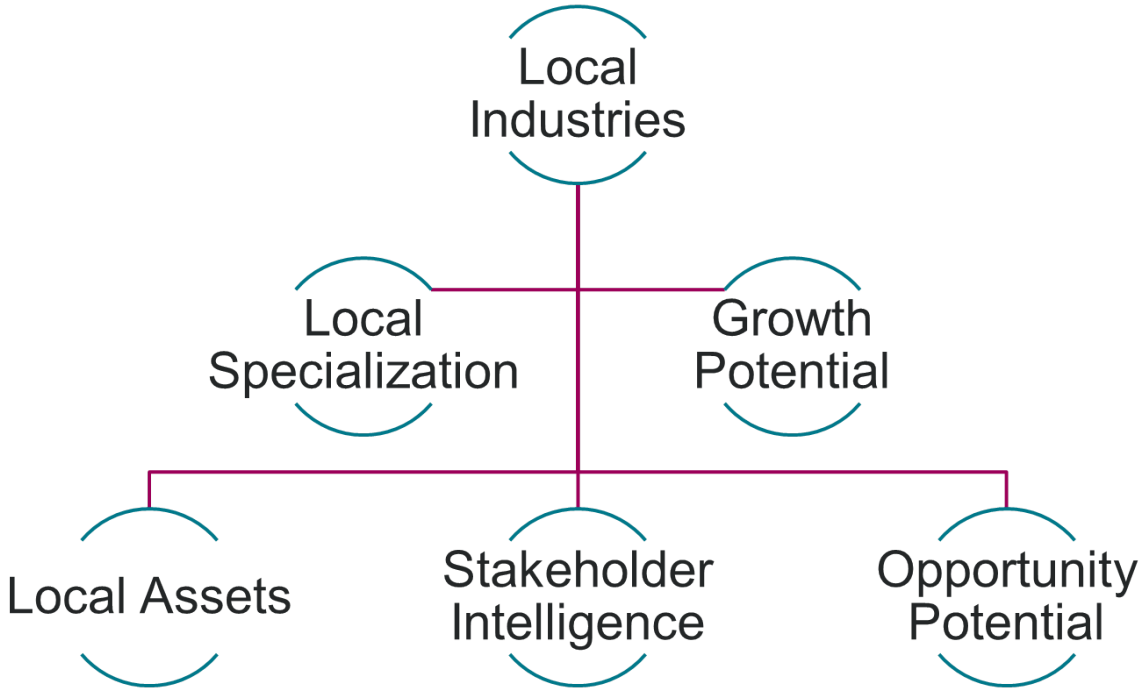


Figure 7 below provides a visual representation of these findings. The theory of sector convergence is used here to uncover opportunity areas because it shows competitive advantages that exist at the point where concentrations in local industry sectors converge. An easier way to explain this is by studying the diagram in Figure 7. As mentioned above, the agricultural sector

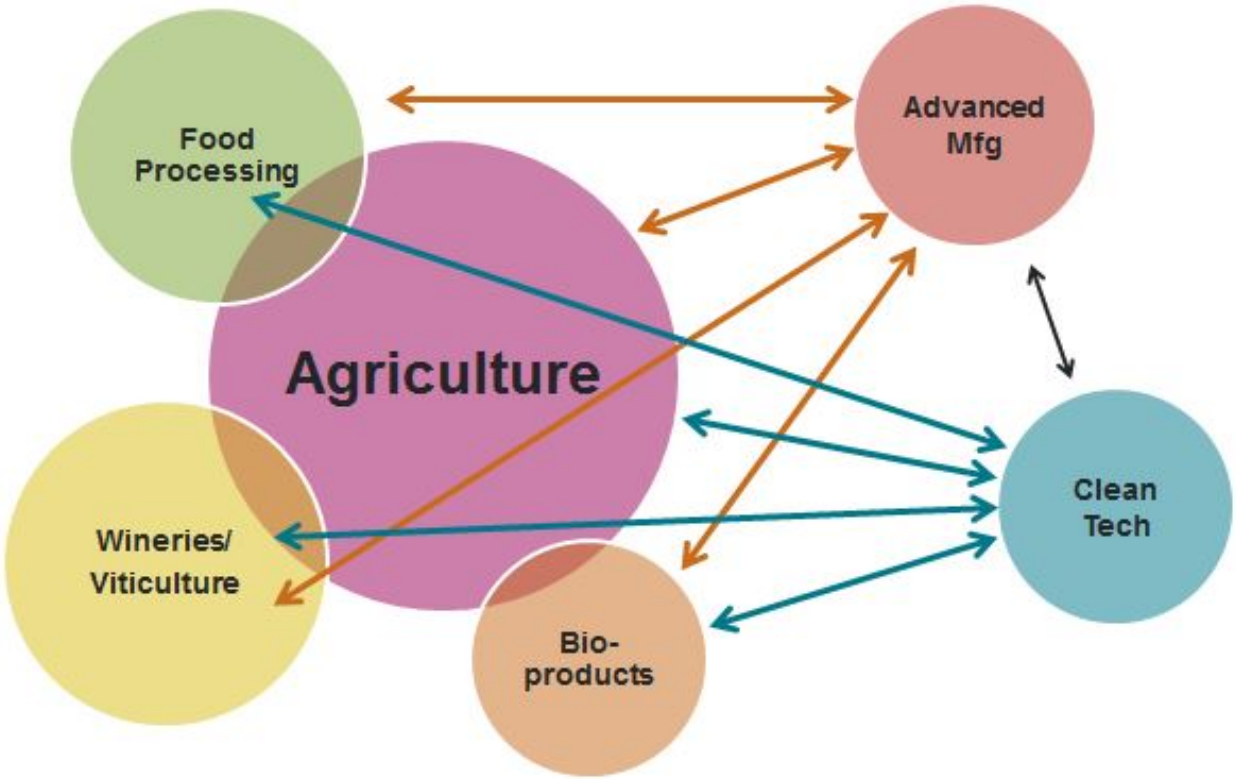
contains the greatest opportunity potential in the South Okanagan area. It is the largest circle in the diagram below as it represents the greatest area of local strength.

Where two circles overlap, the community has an area of competitive advantage at a regional or national level. If three circles overlap, the advantage is significant enough to position the community as a leading destination for investment from an external source.

In this case, the following subsectors have a competitive advantage because of their convergence with agriculture:

- Food Processing
- Wineries and Grape Growing
- Bio-products

FIGURE 7: SECTOR CONVERGENCE DIAGARAM[4]



Although they do not converge, that is to say, there is not as much of a direct competitive advantage, on their own, advanced manufacturing and clean technologies are still in the diagram. This is because they still represent opportunities in their own right. However, the arrows on the diagram show that these local sectors feed into the agricultural sector and the other convergence sectors. In the context of investment attraction targeting, this tells us that the most logical approach is one where investment attraction resources are used to focus on targets and opportunities associated with the agricultural sector first. It also indicates that the

[4] NOTE: Clean Tech in this report is defined according to Statistics Canada's definition: the environmental industry is composed of establishments operating in a variety of industries that produce environmental goods and services that are used, or can potentially be used to measure, prevent, limit, or correct environmental damage. They include clean or resource-efficient (eco-efficient) technologies that decrease material inputs, reduce energy consumption, recover valuable by-products, reduce emissions, and/or minimise waste disposal problems.

subsectors of food processing, grape and wine, and bioproducts should also be pursued – but, in relation to how they converge with agriculture and the increased value proposition that the local agricultural sector lends to this.

Finally, when pursuing opportunities associated with agriculture and the convergence subsectors, it is also important not to discount how advanced manufacturing and clean technologies feed into these sectors. There are opportunities that can be explored, for example, innovative machinery and equipment that improve productivity and outputs, or technologies that improve processes, product yields, increase safety or present new ways of accessing markets.

The purpose of this section has been to focus SOSED's approach to target sectors based on the Industry Targeting Decision Tree. In the following section, the strengths, weaknesses, opportunities and threats are examined for each sector. These SWOT analyses are followed by an outline of the more refined opportunities that each sector contains from a local perspective.

4.1 Target Sector SWOT Analyses and Opportunities

A Strengths, Weaknesses, Opportunities, and Threats analysis is a useful strategic planning tool that supports decision making through the identification of internal and external factors that directly affect the viability of a project or plan. Each of the target sectors have been subjected to a SWOT Analysis in order to inform the prioritization of SOSED's investment attraction efforts.

In this context, strengths are attributed to industry concentrations, local assets and resources, local initiatives, existing momentum, and other positive economic activity that can be built on to support local growth and prosperity. Weaknesses are current disadvantages internal to the area that hinder, or impeded successful investment attraction outcomes. These factors may require improvement, strengthening, or mitigation in order to encourage and support the ability to capitalize on opportunities.

Opportunities are specific elements that SOSED's can leverage to its advantage in order to overcome challenges and effect positive change. Threats are generally associated with factors that may jeopardize a community's success and represent barriers, or obstacles that may prevent the area's ability to implement its strategy.

These analyses have been developed using the collective research contained in the accompanying Technical Report.

4.1.1 Agriculture

Strengths	Weaknesses
■ Strong reputation in BC for producing clean, safe, and natural foods ■ Access to high quality research facilities ■ Already established large foreign investors in the sector (e.g. alfalfa farm)	■ Limited number of producers that are suited and ready for investment ■ Many gaps in the supply chain limiting growth ■ Lack of processing facilities
Opportunities	**Threats**
■ Land based seafood operations ■ Establishment of an “agri-tech” Centre of Excellence ■ Enhancing food processing capabilities	■ Changes in FDI rules limiting investment flows ■ Non-welcoming attitude by some community members towards foreign owned business

4.1.1.1 Emerging Opportunities

- Land-based seafood operations
- Hops growing
- Medical marijuana production
- Investing in the region’s food processing capacity (niche and organic)
- Connecting agricultural waste with commercial/industrial processes
- Investing to position the region as an “agri-tech” hub
- Working more closely with the Summerland Research and Development Centre
- Working with foreign investors that have already invested in the South Okanagan

4.1.2 Wineries and Grape Growing

Strengths	Weaknesses
▪ Favourable microclimates and soil conditions for wine production ▪ Internationally recognized and known as an area for good quality wine ▪ Access to high quality research facilities and support systems	▪ A lot of small “mom and pop” wineries that aren’t reinvesting or expanding ▪ Highly regulated sector where the rules are difficult to navigate and seen as outdated ▪ Supply chain limitations and shortages
Opportunities	**Threats**
▪ Strong increasing demand in Asian markets for wine (both grape and fruit/berry) ▪ Harnessing new developments in agri-tech to increase production ▪ Attracting investment in wine-related supply chain businesses	▪ Fraudulent labelling of wines in certain Asian markets ▪ Changes in FDI rules limiting investment flows

4.1.2.1 Emerging Opportunities

- Increasing exports to Asia (China in particular)
- Supporting the South Okanagan to become an agri-tech hub
- Capitalizing on the continued trend towards premium and “craft” products
- Increasing acreages of high value crops to build capacity (e.g., grapes)
- Attracting investment in wine-related supply chain businesses
- Emerging free trade negotiations between Canadian provinces and territories

4.1.3 Food Processing

Strengths	Weaknesses
■ Strong reputation in BC for producing clean, safe, and natural foods ■ Critical mass of primary agriculture producers in the region ■ Good access to transportation networks for export (i.e. airports, port of Vancouver)	■ Limited number of producers that are suited and ready for investment ■ Limited availability of facility rental space ■ Supply chain limitations and shortages
Opportunities	**Threats**
■ Rising global demands for healthy, packaged foods ■ Creating new product from agricultural waste (e.g. “B” quality”) ■ BC carving out a bit of a niche as an agrifood centre	■ Already experiencing food processing companies leaving the region due to facility limitations ■ Changes in FDI rules limiting investment flows

4.1.3.1 Emerging Opportunities

- Rising global demands for healthy, packaged foods
- Harnessing the booming tourism sector to support the sale of value-added agricultural products
- Creating new product from agricultural waste
- Improving local food processing capacity and market linkages for B products and organic specialty products
- Attracting investment in food processing related supply chain businesses

4.1.4 Clean Technology[5]

Strengths	Weaknesses
■ BC companies recognized globally as having top quality technology in clean tech ■ Close proximity to a world clean tech cluster in Vancouver ■ Access to high quality research facilities	■ Difficulties for BC companies to prove their technologies because of issues getting demonstration sites established ■ Perception by foreign entrepreneurs that BC clean technologies are designed for a small scale
Opportunities	**Threats**
■ Incentivizing the inclusion of clean tech demonstration sites in municipal infrastructure planning ■ Foreign entrepreneurs looking to invest in BC companies at a ground level	■ Global competition for clean tech investment against leaders in the sector such as Germany, Australia, and Israel ■ Changes in FDI rules limiting investment flows

4.1.4.1 Emerging Opportunities

- Tracking and capitalizing on legislation by foreign governments to encourage new clean tech solutions in their countries
- Incentivizing the inclusion of clean tech demonstration sites in municipal infrastructure planning
- Good opportunities for solar power generation given the climate in the region
- Collaboration and partnerships between municipalities and First Nations communities
- Working with foreign entrepreneurs looking to invest in BC companies at a ground level to evolve technology to a scale that can be applied in their home country
- Further positioning Okanagan College's Jim Pattison Centre for Excellence in Sustainable Building Technologies and Renewable Energy Conservation as a hub of clean tech activity

[5] NOTE: Clean Tech in this report is defined according to Statistics Canada's definition: the environmental industry is composed of establishments operating in a variety of industries that produce environmental goods and services that are used, or can potentially be used to measure, prevent, limit, or correct environmental damage. They include clean or resource-efficient (eco-efficient) technologies that decrease material inputs, reduce energy consumption, recover valuable by-products, reduce emissions, and/or minimise waste disposal problems.

4.1.5 Bio-products

Strengths	Weaknesses
■ BC a well-known global supplier of wood ■ Good access to biomass through agriculture and forestry ■ Good manufacturing and professional services base to support the bioproducts sector	■ Little bio-product activity happening in the region ■ Limited availability of facility rental space ■ Limited labour force, especially skilled industrial labour
Opportunities	**Threats**
■ Connecting agricultural waste with commercial/industrial processes ■ Foreign entrepreneurs looking to invest in BC companies at a ground level	■ Global competition for bio-product investment ■ Changes in FDI rules limiting investment flows

4.1.5.1 Emerging Opportunities

- Connecting agricultural waste with commercial/industrial processes (for example waste bi-products from crop harvesting acting as feedstock for bio-digesters for energy production)
- Working with foreign entrepreneurs looking to invest in BC companies at a ground level to evolve technology to a scale that can be applied back in their home country
- Collaboration and partnerships between municipalities and First Nations communities

4.1.6 Advanced Manufacturing

Strengths	Weaknesses
▪ Strong quality of life attributes have the potential to attract more skilled labour to the region ▪ Good manufacturing and professional services base to support an expanded advanced manufacturing sector ▪ Competitive cost of doing business (e.g. labour, real estate, taxes) ▪ Good access to transportation networks for export (i.e. airports (local for talent and business travel), port of Vancouver and US access through Osoyoos)	▪ Currently a limited labour force, especially skilled industrial labour ▪ Limited availability of facility rental space ▪ Limited IT infrastructure (e.g. high speed connectivity) ▪ Relative distance from urban centres increases transportation and shipping costs can act as a competitive disadvantage in some cases
Opportunities	**Threats**
▪ Value-added and high tech manufacturing ▪ Collaborating with foreign investors who may have greater access to raw materials in their home countries	▪ Changes in FDI rules limiting investment flows (both from the Canadian government and foreign governments) ▪ Non-welcoming attitude by some community members towards foreign owned business

4.1.6.1 Emerging Opportunities

- Value-added and high tech manufacturing
- Collaborating with foreign investors who may have greater access to raw materials in their home countries
- Increasing capacity in local trade schools and technical college producing more skilled labour

4.2 Establishing a Priority Pathway

As was previously mentioned, given the limited resources available to the SOSEDS and their partner organizations, it is important that the approach to investment attraction is focused and prioritized. Drawing on the findings from the SWOT analysis and the collective filtering process, the target sectors were then subjected to a set of evaluation criteria. The purpose of this was to establish a priority pathway so that SOSEDS understands what it should focus on first, and that these areas of focus will have a cumulative and overlapping benefit, as activities are undertaken.

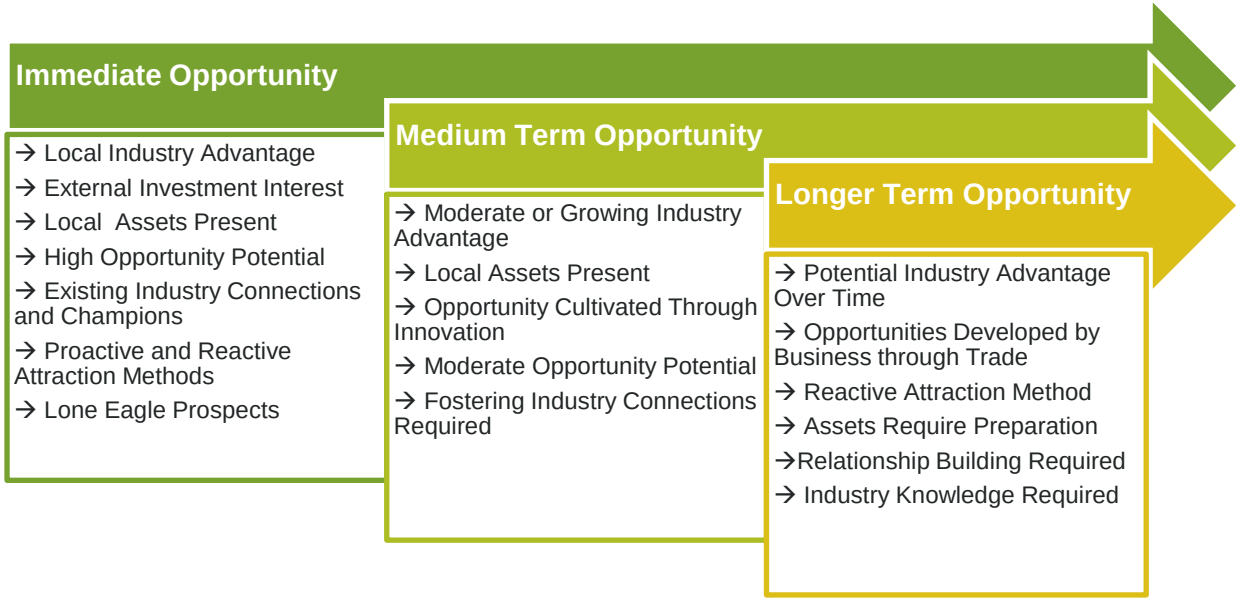
In Figure 8, each level of opportunity contains a series of defining criteria. These criteria help to evaluate the current state of the industry sector locally and its relationship to investment readiness / attraction and SOSEDS' initiatives.

They also indicate what types of opportunity potential each sector presents for the area. In addition, the criteria include the different types of actions that need to be taken by SOSEDS to support investment attraction, and what level of involvement is required.

Considering these evaluation criteria, the target sectors were scored by the project team. Each sector was given a level of priority ranging from:

- Immediate Opportunity
- Medium Term Opportunity
- Long Term Opportunity

FIGURE 8: PRIORITY PATHWAY EVALUATION CRITERIA



Based on these results, a timeline emerged and a priority pathway was established for SOSEDS indicating which sectors to focus immediate attention and resources on. It also validated the results of the Industry Targeting Decision Tree. The results of this phase are applied to a matrix in order to cross-reference the strategic approaches (identified earlier in Figure 5) and select economic drivers in order to finalize SOSEDS targets (see Figure 9 below).

4.2.1 Opportunities by Select Economic Drivers

As highlighted in the section above, the table below provides an at-a-glance view of how the target sectors stack up against each other. To assist the final prioritization process, the opportunity potential was evaluated by the amount of support senior levels of government provide for investment attraction in the sectors. Near-term investment potential, how new investment can complement the existing economy, and sustainable impact on the community were considered. Further, the fit with the three strategic approaches to investment attraction (greenfield land, direct to business, and lone eagle/entrepreneurship) were reviewed and how they match the local assets and their availability to support investment opportunities.

The table in Figure 9 highlights that the strongest priority sectors for driving investment attraction opportunities are agriculture, grape and wine, and food processing. This is followed by bio-products and clean technologies, and by advanced manufacturing.

FIGURE 9: OPPORTUNITIES BY SELECT ECONOMIC DRIVERS

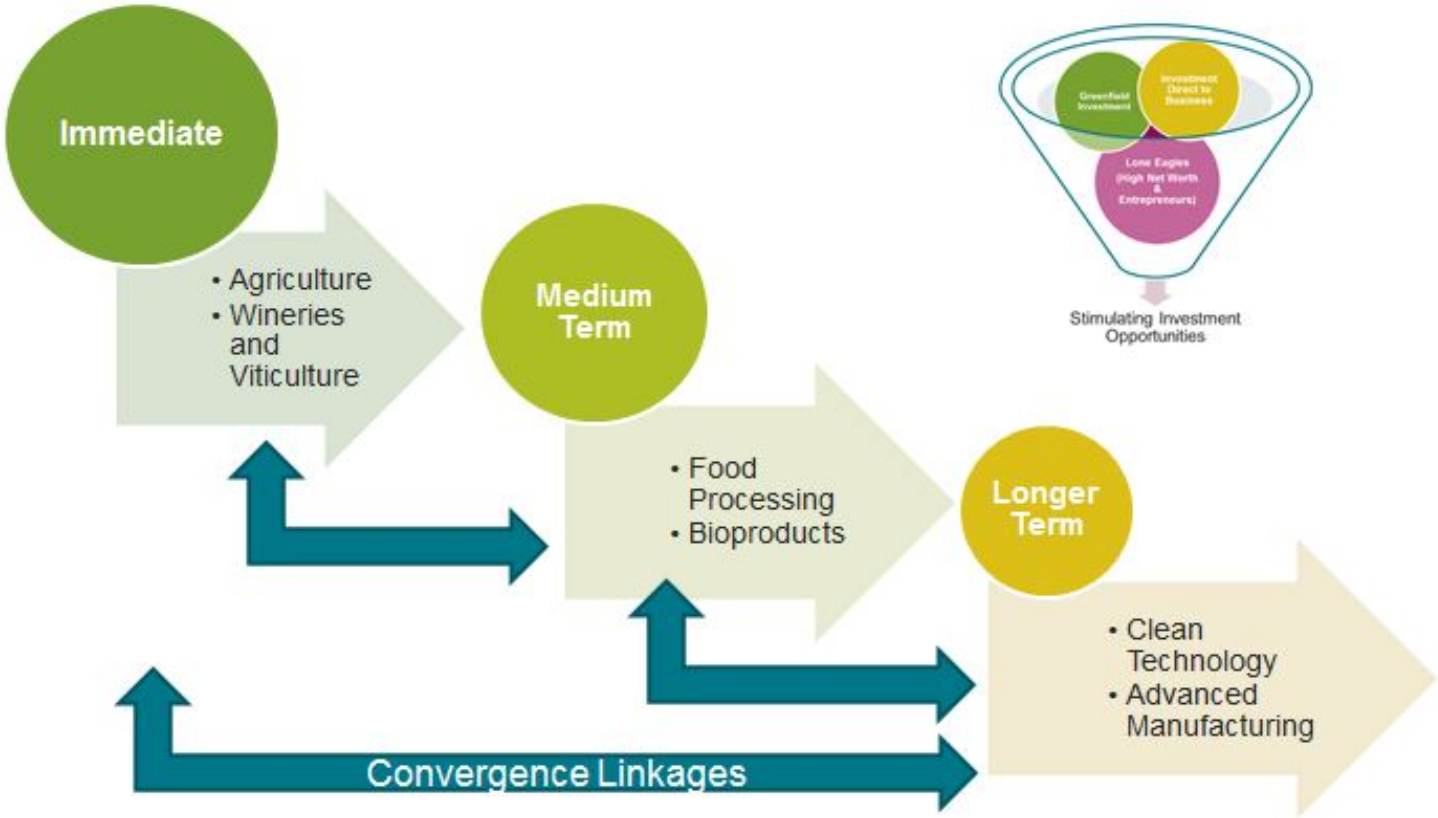
Driver	Agri.	Grape & Wine	Food Process.	Bio-products	Clean Tech	Adv. Mfg
Estimated Near-term FDI Potential	Very Strong	Very Strong	Strong	Low	Low	Low
Supported by Senior Development Efforts	Yes BC FED	Yes BC FED	Yes BC FED	Yes BC FED	Yes BC FED	Yes BC FED
Complement Existing Local Economic Base	Very Strong	Very Strong	Very Strong	Strong (forming)	Low	Medium
Significant and Sustaining Impact on Local Economy	Very Strong	Strong	Very Strong	Medium	Medium	Very Strong
Fit with Strategic Approaches (see legend below)	LAND, DIRECT, EAGLE	LAND, EAGLE	LAND, DIRECT, EAGLE	DIRECT, EAGLE	DIRECT, EAGLE	LAND, DIRECT

LEGEND: Strategic Approaches: **LAND =** Greenfield Land Opportunities; **DIRECT =** Investment Direct to Business; **EAGLE =** High Net Worth Individuals and Entrepreneurs looking for investment and business purchase/start-up opportunities
(Click on **Findings and Understandings** to review the section above for more details)

4.2.2 Recommended Approach

Taking all of the results above into consideration, the final approach for investment attraction activities by sector targets is outlined below. Section 9 Sector Profiles contains detailed information that further refines the opportunity potential by the immediate and medium term priority industries. The Sector Profiles also take the supportive industries into consideration. These tactical tools will support SOSEDS in undertaking its first outreach activities identified in the Action Plans in the section below.

FIGURE 10: PRIORITY PATHWAY AND RECOMMENDED APPROACH



5 Action Planning

5.1 Strategic Directions

Based on the evidence presented above, this strategy recommends three key strategic directions for SOSEDS to undertake in the next five years. These directions will underpin how the new organization is structured and include different actions that can increase the areas investment readiness, and its ability to support reactive and proactive approaches to investment attraction.

Three Strategic Directions		
Establish an Official Economic Development Framework for SOSEDS	**Create Formal Investment Attraction Programming**	**Develop Ongoing After Care Supports**

Each strategic direction has an action plan with specific activities (recommended initiative). The priority, partners, and resources for each recommended initiative are identified.

The level of priority is based upon:

- Sense of urgency and level of immediacy indicated by the consultations and research
- Level of economic development potential and gain for the South Okanagan region
- Feasibility and suitability based on local assets and SWOT analyses
- Resources required and value for output
- Logical sequence of actions

Priority levels are as follows:

- Ongoing = Current Action or Once Established
- Highest = Immediate
- High = Within One Year
- Moderate = Within 3 Years
- Low = Between 3-5 Years

Given fiscal restraint, limited funding resources, and competing priorities for core service delivery, these priority levels recommend a starting point, and may not indicate completion. It is recognized that some of the recommended initiatives may take 1-3 years to complete or may even span the life of the current strategy and be carried over into the next planning period.

5.2 Establishing the Economic Development Framework

Recommended Initiative	Team Lead and Priority	Partners	Resources
Formalize the South Okanagan – Similkameen Economic Development Group (SOSEDS) ▪ Establish a Memorandum of Understanding (MOU) between SOSEDS Partners ▪ This should include a well-defined Terms of Reference and Service Level Agreements that outline roles and responsibilities of member organizations ▪ Create a framework for managing operations from a financial and human resource perceptive with clear oversight responsibilities ▪ Investigate the demand and feasibility of establishing SOSEDS as a non-profit organization ▪ Produce a Business Plan that outlines a vision, mission, goals, directions, marketing, financial plans, and long term funding model ▪ Formalize the SOSEDS Committee into a Board of Directors as an accountability measure ▪ Investigate grants and public funds that can be leveraged to support the SOSEDS organization, its initiatives, and the hiring of a dedicated investment attraction resource ▪ Investigate private sector approaches to seed and donation funding ▪ Determine what professional services by external providers are required (e.g., accounting, legal, payroll, IT etc.) ▪ Determine where SOSEDS will be housed (temporarily and/or permanently)	Community Futures Okanagan Similkameen Highest	▪ City of Penticton ▪ Summerland Chamber of Commerce ▪ Penticton Indian Band ▪ Osoyoos Indian Band ▪ Town of Oliver ▪ Town of Osoyoos ▪ Town of Summerland ▪ District of Summerland ▪ Okanagan Falls ▪ BC Ministries (International Trade; Jobs, Tourism and Skills Training and Work BC) ▪ SOICS	▪ In-kind administrative contributions from partner organizations ▪ Budget of approx. $5,000 (some documentation could be borrowed from other organizations, but, advice may be required) ▪ Budget of Approximately $1,500 - $2,000 for incorporation (if establishing non-profit) ▪ Budget of $10,000 if external resources required for business plan development and Board recruitment ▪ Budget of $5,000 - $10,000 may be required for grant and application writing and processing

Recommended Initiative	Team Lead and Priority	Partners	Resources
Dedicated Investment Attraction Officer / Liaison ▪ Ensure appropriate budget allocations to support economic development activities and a full-time role ▪ Create a full-time, dedicated Investment Attraction Officer position and fill the role ▪ The development of an Investment Attraction Business Plan is recommended as a first order of business • This plan should include proactive and reactive methods and clearly outline connectivity to the performance measures outlined in this report ▪ This role is responsible for implementing the SOSED FDI Strategy 2016 (this report) ▪ This role is responsible for coordinating investment attraction activities among partner organizations and is the point of contact for inbound inquiries to the area	SOSEDS (care of Community Futures Okanagan Similkameen until SOSEDS formally established) Ongoing – Highest	▪ Community Futures Okanagan Similkameen	▪ $80,000 - $100,000 Annual Salary commensurate upon experience (excluding employment related expenses of approximately 30% of base salary)
Create an Industry and Stakeholder Advisory Committee ▪ Engage previous industry/business volunteers and actively recruit new local prospects based on clear understanding of value and expertise, and contribution candidates can bring to the group ▪ Ensure the focus of this group is on providing insight into ways that the economy can be built out through business attraction, and the creation of new market opportunities for local industry	SOSEDS (care of Community Futures Okanagan Similkameen until SOSEDS formally established) Ongoing – High	▪ Community Futures Okanagan Similkameen ▪ City of Penticton ▪ Summerland Chamber of Commerce ▪ Penticton Indian Band ▪ Osoyoos Indian Band ▪ Town of Oliver ▪ BC Ministries (Jobs, Tourism and Skills Training and/or International Trade) ▪ Local Immigration Partners ▪ Workforce Development and Employment Partners	▪ In-kind contributions from partner organizations ▪ Staff time of Investment Attraction Officer ▪ Minor local travel expenses

5.3 Creating Investment Attraction Programming

Recommended Initiative	Team Lead and Priority	Partners	Resources
Develop Lead Generation Network Connections for SOSEDS ▪ Establish and grow relationships with key contacts in the BC Ministry of International Trade with portfolios that reflect SOSEDS target sectors ▪ Establish and grow relationships with key contacts in the Canadian Trade Commissioner Service with portfolios that reflect SOSEDS target sectors ▪ Develop relationships with key influencers in Commercial Real Estate involved in site selection ▪ Develop relationships with industry association executives in target sectors ▪ Identify and develop collaborative working relationships with inter-regional economic development organizations (e.g. Invest Okanagan) ▪ Establish connections with the investment and business finance community to leverage knowledge and opportunities	SOSEDS (care of Community Futures Okanagan Similkameen until SOSEDS formally established) Ongoing - High	▪ City of Penticton ▪ Summerland Chamber of Commerce ▪ Penticton Indian Band ▪ Osoyoos Indian Band ▪ Town of Oliver ▪ Town of Osoyoos ▪ Okanagan Falls ▪ Town of Summerland ▪ District of Summerland ▪ BC Ministries (International Trade and/or Jobs, Tourism and Skills Training) ▪ Community Futures Okanagan Similkameen ▪ Local Immigration Partners ▪ Workforce Development and Employment Partners ▪ Local and regional business and investment consulting services ▪ Local and Regional Finance, Angel, and Venture Capital Investor Networks	▪ Staff time of Investment Attraction Officer ▪ Budget of $15,000/ year for travel and networking expenses (this can include minor domestic event registrations)

Recommended Initiative	Team Lead and Priority	Partners	Resources
Establish Single Portal Marketing for SOSEDS ■ Investigate most Effective Means of Leveraging Existing Marketing Vehicles (e.g., Invest Okanagan.com) ■ Undertake a collaborative marketing exercise to establish a common vision, messaging, and approach to promotion ■ Coordinate the development of SOSEDS marketing material ■ Create a SOSED website, or landing page ■ "Content is King" – it drives traffic to websites – a copywriting specialist is needed	SOSEDS (care of Community Futures Okanagan Similkameen until SOSEDS formally established) High	■ City of Penticton ■ Summerland Chamber of Commerce ■ Penticton Indian Band ■ Osoyoos Indian Band ■ Town of Oliver ■ Town of Osoyoos ■ Okanagan Falls ■ Town of Summerland ■ District of Summerland ■ Okanagan Valley Economic Development Society	■ $10,000 - $25,000 (for graphic design and branding support) ■ $7,000 - $10,000 (for basic website design, hosting, graphic design etc.) ■ $15,000 per year for search engine optimization copywriting services ■ In-kind contribution of partner resources ■ Staff time of Investment Attraction Officer
Conduct Local Industry Visits and Corporate Calling Initiative ■ Leverage connection with municipal partners and stakeholders to facilitate site visits to key local companies in target sectors ■ Ensure that information and knowledge is captured through Business Retention and Expansion (BR&E) program (see below)	SOSEDS in cooperation with local municipal stakeholders / partners Ongoing – High	■ City of Penticton ■ Summerland Chamber of Commerce ■ Penticton Indian Band ■ Osoyoos Indian Band ■ Town of Oliver ■ Okanagan Falls ■ Town of Osoyoos ■ Town of Summerland ■ District of Summerland ■ Community Futures Okanagan Similkameen	■ Staff time of Investment Attraction Officer ■ Budget of $5,000 for local travel and networking expenses

Recommended Initiative	Team Lead and Priority	Partners	Resources
Use Target Sector Profiles to begin Strategic Outreach (see Section 9 Sector Profiles) ▪ Develop an outreach program that includes a plan for strategically attending trade shows and events where lead generation activities are confirmed ▪ Leverage relationships through the Lead Generation Network identified above to participate in lead generation activities (these should be target sector specific) ▪ Investigate potential company targets through local industry knowledge gathering ▪ Examine private lead generation services to open doors and coordinate meetings with decision makers and influencers ▪ Dedicate resources to market research on company targets before initiating contact	SOSEDS (care of Community Futures Okanagan Similkameen until SOSEDS formally established) Ongoing – Moderate	▪ City of Penticton ▪ Summerland Chamber of Commerce ▪ Penticton Indian Band ▪ Osoyoos Indian Band ▪ Town of Oliver ▪ Town of Osoyoos ▪ Town of Summerland ▪ District of Summerland ▪ BC Ministries (International Trade and Jobs, Tourism and Skills Training) ▪ Canadian Trade Commissioner Service ▪ Local Industry and Business ▪ Local Commercial Real Estate Community ▪ Community Futures Okanagan Similkameen	▪ Staff time of Investment Attraction Officer ▪ Budget can range from $20,000 to $100,000 depending on number of external events targeted and what collaborative funds can be leveraged through joint initiatives ▪ This includes travel and event registration ▪ One international show including travel and accommodation, lead generation consulting fees, and event registration can cost $10,000 - $15,000.
Coordinate Strategic Familiarization Tours ▪ Coordinate local tours of strategically targeted influencers and decision makers • This includes key actors in the lead generation network, business leaders in target sectors, ICI Real Estate Agents and Site Selectors, entrepreneurs and innovators ▪ Investigate opportunities to leverage provincial and federal tours and participate in similar activities at regional scales	SOSEDS in cooperation with local municipal stakeholders / partners Ongoing – Moderate	▪ Summerland Chamber of Commerce ▪ BC Ministries (International Trade and Jobs, Tourism and Skills Training) ▪ Canadian Trade Commissioner Service ▪ Local Industry and Business ▪ Local Commercial Real Estate Community ▪ Penticton Indian Band ▪ Osoyoos Indian Band	▪ Budget of $7,000 - $25,000 depending on frequency of tours, level of travel and accommodation covered, and location of target audiences ▪ Staff time of Investment Attraction Officer ▪ In-kind contributions by partner organizations

Recommended Initiative	Team Lead and Priority	Partners	Resources
Coordinate Trade and Investment Missions with Local Companies ▪ Through establishing relationships with provincial and federal trade representatives, identify opportunities to participate in target sector specific missions ▪ Coordinate a group of local companies that have specific interests in market expansion and international trade opportunities and facilitate participation in mission activities along target sector lines ▪ Investigate programs to offset the cost of business participation in trade activities	SOSEDS Ongoing – Low	▪ Summerland Chamber of Commerce ▪ BC Ministries (International Trade and Jobs, Tourism and Skills Training) ▪ Canadian Trade Commissioner Service ▪ Local Industry and Business ▪ Select Municipal Partners ▪ Penticton Indian Band ▪ Osoyoos Indian Band	▪ Budget can range from $20,000 to $100,000 depending on number of external events targeted and what collaborative funds can be leveraged through joint initiatives

5.4 Developing Ongoing After Care Supports

Recommended Initiative	Team Lead and Priority	Partners	Resources
Establish a Formal Business Retention and Expansion (BR&E) Program ▪ Identify what municipal partners have formal BR&E programs in place ▪ Investigate if any partners have Client Relationship Management (CRM) systems and opportunities to leverage or buy-in to these ▪ Identify all local businesses that operate within the target sectors and catalogue these through a database ▪ Leverage local knowledge and research to identify growth companies and important contacts ▪ Establish an annual corporate calling initiative that gathers intelligence and identifies company needs and challenges ▪ Coordinate local regulators to be prepared to respond proactively to expansion and location requirements	SOSEDS (care of Community Futures Okanagan Similkameen until SOSEDS formally established) Ongoing – Moderate	▪ City of Penticton ▪ Summerland Chamber of Commerce ▪ Penticton Indian Band ▪ Osoyoos Indian Band ▪ Town of Oliver ▪ Town of Osoyoos ▪ Okanagan Falls ▪ Town of Summerland ▪ District of Summerland ▪ Local Immigration Partners ▪ Workforce Development and Employment Partners	▪ Budget of $10,000 which can include CRM licencing for one user and local travel and networking expenses ▪ One time fees may be associated with buying in to CRM systems or purchasing new licencing
Develop After Care Program ▪ Coordinate local business, immigration, and workforce development services to provide timely integration and a soft landing platform ▪ Create a local welcoming program that includes local politicians and dignitaries ▪ Assemble a group of various business services including accounting, taxation, finance, and legal professionals that can support business establishment in Canada ▪ Streamline new companies into the B&E program for ongoing support and plan opening celebrations if desired (including local media exposure)	SOSEDS Ongoing – Moderate	▪ SOSEDS partner Organizations ▪ Specific local municipalities and political officials ▪ Summerland Chamber of Commerce ▪ Local Immigration Partners ▪ Workforce Development and Employment Partners	▪ Staff time of Investment Attraction Officer ▪ In-kind contribution of partner resources ▪ Minor local travel expenses ▪ Potential minor marketing and promotional costs

6 Implementation Plan

6.1 Schedule and Required Resources

Action	Required Resources		Priority				
			Highest	High	Moderate	Low	Ongoing
	Financial	Human	Immediately	Within One Year	Within 3 Years	Between 3-5 Years	Current Action or Once Established
Establishing the Economic Development Framework							
Formalize the South Okanagan – Similkameen Economic Development Group (SOSEDS)	$25k one time	in-kind					
Dedicated Investment Attraction Officer / Liaison	$80-100k/year plus benefits	in-kind to establish position					
Create an Industry and Stakeholder Advisory Committee	minor travel	50 hours staff					
Creating Investment Attraction Programming							
Develop Lead Generation Network Connections for SOSEDS	$15k/year	100 hours staff					
Establish Single Portal Marketing for SOSEDS	$50k + $20k/year	300 hours staff					
Conduct Local Industry Visits and Corporate Calling Initiative	$5k/year	300 hours staff					
Use Target Sector Profiles to begin Strategic Outreach	$35-115k/year	500 hours staff					
Coordinate Strategic Familiarization Tours	$7-25k/year	200 hours staff					
Coordinate Trade and Investment Missions with Local Companies	$20-100k/year	300 hours staff					
Developing Ongoing After Care Supports							
Establish a Formal Business Retention and Expansion (BR&E) Program	$10k/year plus local travel	400 hours staff					
Develop After Care Program	local travel	100 hours staff					

6.2 Performance Measures

The charts on the following page outline performance measures under the following classification:

- **Output** – providing services or completing activities
- **Quality –** how well services are delivered and the extent to which clients are satisfied
- **Outcome –** results of a program activity compared to its intended purpose
- **Concordance –** effectiveness of organizational operations in terms of their specific contributions to program objectives

Establishing the Economic Development Framework

Output	Quality	Outcome	Concordance
■ **Establish a Memorandum of Understanding (MOU) between SOSEDS Partners including Terms of Reference and Service Level Agreements that outline roles and responsibilities of member organizations** ■ **Formalize the SOSEDS Committee into a Board of Directors as an accountability measure** ■ **Produce a Business Plan that outlines a vision, mission, goals, directions, marketing, financial plans, and long term funding model** ■ **A full-time, dedicated Investment Attraction Officer is in place**	■ Positive reception by local business and community leaders ■ Development of an Investment Attraction Business Plan ■ Establishment of an Industry and Stakeholder Advisory Committee	■ Clear understanding of how investment attraction marketing will be undertaken in South Okanagan ■ Agreement amongst business leaders on the rationale behind the benefits of a regional approach and on the investment priorities identified in the SOSEDS FDI Strategy	■ Consistency with local municipal objectives for increased investment ■ Successful leveraging of local budget through senior levels of government

Creating Investment Attraction Programming

Output	Quality	Outcome	Concordance
■ **Marketing program that has a common vision, messaging, and approach to promotion** ■ **Website that is making use of the latest technology to improve the access that prospective investors have to information on the region** ■ **Content generation that has pushed the website to the top of search engine ranking for investing in British Columbia**	■ Investment representatives, including those from the BC Ministry of International Trade, Canadian Trade Commissioner Service, industry association representatives, and other key influencers, have an improved perception and understanding of the region's competitive position ■ Collaborative working relationship is established with inter-regional economic development organizations such as Invest Okanagan	■ Increased growth in expansion and new location of firms in sector priorities in the region ■ Opportunities cultivated that link local industry expansion with sector growth ■ Report back annually on FDI activity including expansions, attraction, job creation, and retention	■ Alignment with Province of British Columbia's investment attraction strategy

Developing Ongoing After Care Supports

Output	Quality	Outcome	Concordance
■ **Industry analysis and engagement process completed identifying best opportunities for encouraging growth and key business leaders for supporting initiatives and investments**	■ Local business leaders are satisfied with business retention and expansion efforts and service provided ■ Local business leaders turned into Champions and Ambassadors that supports investment attraction and increased awareness of South Okanagan an ideal business location	■ Established formal Business Retention and Expansion Program that gathers intelligence and identifies company needs and challenges ■ Database of all local businesses that operate within the target sectors ■ Coordinated initiative where local business, immigration, and workforce development services are providing timely integration and a soft landing platform	■ Increased involvement with local business community and successful coordination with local regulators and municipalities on business expansion and investment readiness

7 Appendix A: Performance Measurement Considerations for Ongoing Operations

From an economic development perspective, performance measurement is a tool to determine how well a job is done using both qualitative and quantitative information and activities. It is a required mechanism that provides visibility to supporting and funding partners to assess effectiveness and performance against plan, whether the service is delivered by an external organization or by an internal department of the municipality. An effective economic development office or organization must perform, measure, and communicate these results appropriately. Generally, performance measurement aims to:

- Provide public accountability
- Assist with human resources management
- Improve performance, and
- Identify a return on investment

Currently, there is no single performance measurement standard for economic development. Part of the reason for this is because economic development roles differ across different communities. Communities have different needs, and economic developers, play different roles and types of work. However, this does not mean it is not important to measure how an organization meets its objectives.

Further complicating things is that often economic development success is difficult to attribute directly to the work of economic development officers or agents. Has employment gone up as a result of work undertaken by the organization, or have other factors had a greater impact? It is difficult to establish concretely the extent of the causal relationship between an economic development activity or program and economic development results. To shrink the gap and extend transparency, the best solution is for the economic development organization to be as honest as possible in attributing the extent of its involvement in particular outcomes.

Relatedly, performance measurement requires time and effort. People need to understand why they are measuring something and if what they are measuring is the correct thing.[6] These processes require an investment of time and resources, because it is more difficult to identify a few solid performance measures than to pick a handful of poor ones.

Time and money is also required to monitor and report on performance measures. Once the measures are identified, it is not enough to simply wait for the results to come in. Sometimes results are obtained by keeping an ongoing log (e.g. responses to

[6] Rohm, Howard, "A Balancing Act: Developing and using balanced scorecard performance systems", Perform: Performance Measurement in Action, Vol 2 2 (May 2002): pp. 1-8.

inquiries, or types and numbers of investment leads) or by tracking specific indicators at events or along timeframes (e.g. number of participants at a workshop, number of workshops per year, etc.). Some results may be obtained through municipal sources or other branches of government, but this is not always the case. Many times the organization tracks its own measures, so as to be clearer about causality of outcomes.

At the same time, the organization (whether internal or external), needs to ensure it is conducting performance measurement as efficiently as possible. This pressure, can force organizations to compromise the quality of performance measurement, which undermines the purpose of performance measurement in the first place.

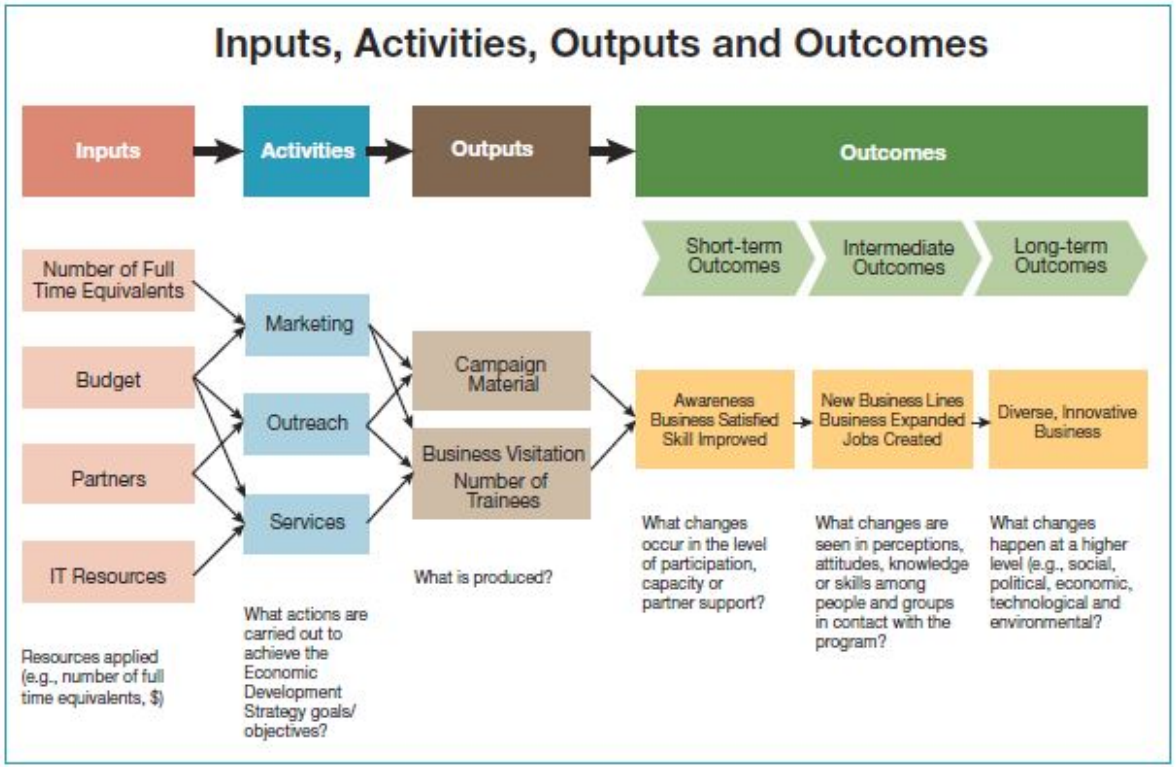
7.1 The Logic Model

The "logic model" is a commonly used economic development performance measurement tool that creates a graphic illustration highlighting the connections and relationships between inputs, activities, outputs, and outcomes of economic development work (shown to the right).

The logic model is particularly important in helping to illustrate the connection between what is invested (i.e. inputs), how that investment is used (i.e. activities), what products/services emerge from the investment and what groups it helps to reach (i.e. outputs), and what the overall changes in the system are from that investment (i.e. outcomes).

The logic model identifies short-term, intermediate, and long-term outcomes to help track the various stages of change that may occur due to the input, activities, and outputs.

THE LOGIC MODEL OF PERFORMANCE MEASUREMENT



Source: Ontario Ministry of Agriculture, Food and Rural Affairs, "Measuring Up! Performance Measurement for Economic Development", 2013, pg. 15

7.2 Getting SMART about Performance Measurement

As communities develop strategic plans that turn their visions into community improvements, they identify how to change these ideas into expectations, such as objectives, goals, and actions. Ensuring the correct measures are used to evaluate progress is important. Economic developers chose and use performance measures based on a model summarized as, SMART:

- **Specific** – measures need to be as specific as possible so that people know how those efforts are going to be measured. This requires identifying and defining the indicator that is going to be looked at to monitor performance
- **Measurable** – indicators must be measurable in a realistic way, whether through quantitative or qualitative methods. An example of a quantitative measure is investment dollars generated, while a qualitative measure may be results of a survey conducted with local businesses to measure quality of service
- **Achievable** –measures must be realistic and reflect something that can be accomplished. This is used to link measures to realistic expectations about what the economic development organization can do
- **Relevant** – measures must be relevant to the vision and mission of the organization. This ensures that the right measure is being used to measure the right thing
- **Time-based** – measures identify targets for when the specific activity has fulfilled its objective. Time-frames are usually short, medium, or long-term

Applying the SMART approach to identifying indicators will improve the performance measure because it is clear and can be measured the same way over time. The SMART approach ensures the correct measure is used to measure the correct thing, and that the measures themselves are believable.

There are additional considerations when creating or implementing a successful performance measurement system which can aid in the process:[7]

- **Select a handful of measures rather than measuring everything** – outcomes should be the main focus of the performance measurement system and it is important to balance the desire for information about performance with an organization's ability to collect and use it. Too many performance measures increase the cost and complexity of measuring performance, often to the point where the entire process can become paralyzed. It is important to brainstorm a large list of performance measures and to select a critical few for ongoing collection and analysis (between six and 12 per program area).

[7] EDAC "Performance Measurement in Economic Development", September 2011, pg.28-29 and Andrew Young School of Policy Studies at Georgia State University "Performance Measurement in State Economic Development Agencies", 2004 from EDAC "Performance Measurement in Economic Development", September 2011, pg. 2

- **Reflect the goals of the organization through the measures selected** – metrics should come directly from the goals of an already established plan. All measures must be clearly defined.
- **Include a few measures to show activity and outputs** – even though the end goal is to focus on measuring outcome, activity and output are useful measures to track what an economic development office is doing and how busy they are (which can be helpful when trying to get budget approval for more resources)
- **Identify a data source for all metrics** – some measures are easier to collect through internal sources. Others take more time and rely on external sources. Some measures may make sense to track on a monthly basis, whereas others will only be meaningful on a quarterly, semi-annual or even annual basis
- **Survey your clients** – some measures require client feedback and will involve the development of data collection tools
- **Claim only what your organization played a role in** – only report on outcomes in which your organization can honestly claim credit for. This is difficult when assessing broad outcomes that may have been contributed to by a number of other organizations
- **Report outcomes over time** – it takes time for economic development projects to take hold, so showing their impacts over time can help show that expenditures in economic development are good long-term investments in the community. All measures should be revisited following a period of time (for at least six months) to determine their usefulness and value

8 Appendix B: Target Sector Profiles

The following section contains detailed sector overviews for each of the recommended target industries. These include the following components:

- Context
    - This provides the reader with an understanding of current industry and market trends that can connect back to the area
- Opportunity
    - The opportunities described here reflect the detailed research process outlined in the methodology and are available in detail in the Technical Report. They are grounded in the local evidence uncovered and provide the user with an understanding of how SOSEDS can consider its approach
- Lead Generation Networks
    - These tables contain lists of the various tradeshows, conferences and events that act as valuable starting points for making contact with prospective investment attraction targets
    - Industry associations and other relevant organizations are identified that have touch points with industry
    - Government contacts that facilitate investment related inquiries are listed. These are important connections to make and relationships to build so that SOSEDS is on the radar when opportunities emerge. They can also act as important partners for coordinating outbound investment attraction activities with local industry
- Educational and Research and Development supports are provided that can be leveraged locally, or more broadly to stimulate opportunities
- The Local Assets listed represent part of the story behind the local value proposition. This is used to support a compelling justification for why the area is attractive for (re)location and potential investment

In conclusion, the intended use of these guides is to provide SOSEDS representatives with the necessary perspective to begin further market research and company targeting.

Food Processing

Context

There were 1,808 food and beverage processing businesses in BC in 2014, accounting for 13% of all manufacturing in the province (one of the largest manufacturing sectors).[8] The number of food and beverage processing businesses in BC rose at a moderate 1.2% between 2008 and 2013. The largest gains in the number of businesses were in:

- Fruit and vegetable preserving and specialty food manufacturing (more than doubling over the five year period)
- Seafood product preparation and packaging
- Beverage manufacturing
- Bakeries and tortilla manufacturing

Export sales in BC's food processing sector grew by 8.5% between 2010 and 2014. The United States is by far the largest export market, with a total value of just over $1 billion (or 51% of total export sales for BC's top ten export markets).[9] China has begun to play a larger role for exports at $285 million, passing Japan ($168 million) and South Korea ($91 million) for the second largest export market for BC food manufacturing.[10]

Opportunity

The global trend in food processing is for healthy, packaged foods. Consumers have limited free time and the frequency of sit-down meals is decreasing. As a result, demand for convenient, ready-to-eat, packaged meal options is expected to increase. Examples of in-demand items include prepackaged salads, low-sodium frozen meals, dried fruit snacks, and frozen organic ingredients. These packaged products generally carry higher profit margins than primary agricultural products.[11]

Despite having few food processing companies operating in the South Okanagan, tremendous opportunity exists to build a food processing industry in the region. This opportunity is based on the large primary agriculture assets that are already there, most especially for "non-citrus fruit and tree nut farming" (such as apples, apricots, nectarines, peaches, small berries, and tree nuts)

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[8] Statistics Canada, Canadian Business Patterns, December 2014
[9] ibid
[10] Statistics Canada & US Census Bureau
[11] Agriculture and Agri-Food Canada, "Industry, Markets, and Trends: Fruits and Vegetables"

as well as “fruit and vegetable combination farming” (with a particular focus on organic vegetables). Complementing this good production is the strong reputation that BC food products have (especially in Asia) for being clean, safe, and natural.

With water shortages happening in agriculture hubs in the US that could limit production (e.g. California), and rising demands for processed foods coming from Asian markets (China especially), the South Okanagan has good opportunities to attract more food processing investment to the region.

Other Food Processing Opportunities for the South Okanagan:

- Harnessing the booming tourism sector to support the sale of value-added agricultural products, adding to agri-tourism experiences in the region and allowing for new opportunities to sell value-added products directly from the farm. New culinary training and tourism experiences could also be created.
- Creating new product from agricultural waste, linking “B” quality” agricultural products to processing opportunities where aesthetic or quality is less important (such as making sauerkraut or onion powder). Anecdotal evidence estimates that upwards of 35% of agricultural yields in the South Okanagan are wasted because of blemishes or other visual quality issues.
- Attracting investment in food processing support businesses, such as labelling, nutrient analysis, and product suppliers to allow for more accessible services for regional food processing operations.

Lead Generation Networks

A number of lead generation networks exist from which relationships and partnerships can be built when pursuing the opportunities listed above. These networks include trade shows/workshops/conferences, associations and organizations, educational and research support, and government contacts.

Trade Show/Workshop/Conference

Event	Date	Description
Salon International de l'Alimentation (SIAL)	Paris, France October 16-20, 2016	SIAL Paris is the largest food and beverage show in the world. This Europe based event attracts buyers from across the globe, showcasing new products, the latest culinary trends, a food science lab, and a focus on food innovation in the sector.
10th Global Summit on Food Processing & Technology	San Antonio, USA December 5-7, 2016	The food processing conference is going to help the people who are directly or indirectly related to the Food processing industry and academia. By this conference people can share their views and ideas and can improve their knowledge about the advanced techniques to increase the productivity of the industries.
17th Global Summit on Food & Beverages	Chicago, USA July 27-29, 2017	The premier event that brings together a unique and international mix of experts, researchers and decision makers both from academia and industry across the globe to exchange their knowledge, experience and research innovations. A place where food and beverage scientists, industrialists and entrepreneurs can meet.
18th Organic Food & Manufacturing Conference	Beijing, China September 10-12, 2017	
20th Global Food Processing Summit	Chicago, USA October 5-7, 2017	
20th International Conference on Food Processing & Technology	London, UK October 8-10, 2017	This food and beverage conference brings food laureates, scientists, researchers, entrepreneurs, investors, executives, designers, technologists, chefs, farmers, journalists, advocates and more together to network, collaborate, share best practices and explore the future of the industry from over 50 countries.

Associations and Organizations

Name	Description
Food Processors of Canada http://foodprocessorsofcanada.ca	Food Processors of Canada is the business association supporting executives who lead food processing companies in Canada. FPC is a community of like-minded people who expect leading edge counsel on confidential matters, practical management of the issues facing business, and proactive leadership.
BC Food Processors Association https://www.bcfpa.ca	The BCFPA is dedicated to, and to help our industry achieve economic prosperity and sustainable safe production. The BCFPA represents micro, small, medium, and large processing companies, and since 2004 has grown to over 300 members.
Small Scale Food Processor Association http://www.ssfpa.net	
FOODTECH Canada http://www.foodtechcanada.ca	Offers a single door to the ultimate resource for food innovation and commercialization. FOODTECH combines expertise from twelve leading food & bio-product technology centres, linking state-of-the-art equipment and the most comprehensive facilities in all of Canada.
Canadian Institute of Food Science & Technology http://www.cifst.ca	CIFST is the national association for food industry professionals. Its membership of more than 1200 is comprised of scientists and technologists in industry, government and academia who are committed to advancing food science and technology. The purpose of CIFST is to advocate and promote the quality, safety and wholesomeness of the food supply through the application of science and technology by linking food science professionals from industry, government and academia.
Investment Agriculture Foundation of British Columbia http://iafbc.ca	AF is an industry-led, not-for-profit organization representing the agriculture, food processing, farm supply, and post farm gate sectors across British Columbia. Since 1996, we have worked with our industry partners and funders to invest in projects that enhance the competitiveness, profitability and sustainability of BC agriculture and agri-food.

Name	Description
The Food Processing Human Resources Council http://www.fphrc.com	A non-profit skills council, providing training courses, programs, and educational tools for the Canadian and international food and beverage workforce. Our wide variety of projects and materials provide national support for the industry to address human resources issues, as well as ensure Canadian processors are equipped with affordable learning tools, standards, and resources to face the future confidently.
Food & Consumer Products of Canada http://www.fcpc.ca	Food & Consumer Products of Canada (FCPC) is the national industry association in Canada representing the food, beverage and consumer products industry. The association represents member companies ranging from small independently and privately-owned companies to large, global multinationals all of whom manufacture and distribute in Canada. Our mission is to create an environment where our members can compete, innovate and grow while enriching the lives of Canadians.

Educational and Research Support

- Summerland Research and Development Centre
- Food Innovation Centre of BC
- Leduc Food Processing Development Centre
- Saskatchewan Food Industry Development Centre
- Guelph Food Technology Centre

Government Contacts

Organization	Name	Position	Telephone	Email
BC Government, Ministry of International Trade, Natural Resource Sector	Michael Nicholas	Senior Director, Agrifoods and Forestry	604-775-2144	
	Rob Arthurs	Senior Manager, Agrifoods	604-375-5112	

Organization	Name	Position	Telephone	Email
Government of Canada, Agriculture and Agri-Food Canada, Food Processing Industry Roundtable	Warren Gould	Deputy Director, Food Industry Division	613-773-0185	Warren.Gould@AGR.GC.CA
Government of Canada, Agriculture and Agri-Food Canada, Market and Industry Services Branch	Jean-Francois Lefier	Senior Advisor	613-773-1771	Jean-Francois.Lefier@AGR.GC.CA

Assets

- Good access to transportation networks for export (i.e. airports, port of Vancouver)
- Critical mass of primary agriculture producers in the region to source product from
- Competitive cost of doing business (e.g. labour, real estate, taxes)
- Access to high quality research facilities (e.g. Summerland Research and Development Centre)
- Already established large foreign investors in the sector (e.g. agriculture and wineries)
- Room for growth with available agricultural land

Wineries/Viticulture

Context

With over 200 wineries, the Okanagan's wine industry is world renowned. The region is responsible for the vast majority of wine production in BC, and is the second highest producing wine area in Canada behind the Niagara Region in Ontario. Throughout the past few years, the Okanagan Valley has been named the top global wine destination by the *Huffington Post*,[12] the second best wine destination by *USA Today*,[13] and one of the top 10 best wine destinations by *Wine Enthusiast Magazine*.[14] Wines produced in the Okanagan are made both from grapes and fruit/berries.

Between 2004 and 2014, wine production in BC grew by 109%.[15] This change is largely attributable to an increase in the number of wineries and grape acreage in the province.[16] Wine industry revenues in the province grew by 41% between 2012 and 2013.[17]

This growth has also led to increases in the exports of BC wine, increasing by 70% from just under $6.0 million in 2010 to $10.2 million in 2015.[18] China remains, by far, the largest export destination of BC wine, accounting for $8.4 million in sales (82% of total wine exports).

There are 101 wineries based in the Regional District of Okanagan-Similkameen. The majority (80%) of the wineries in the region are small scale, employing between 1 and 19 employees. That being said, some larger wineries employing 100-199 people are also present in the region.

Opportunities

Global consumption of still and sparkling wines increased by 2.7% between 2009 and 2013, with China seeing the greatest upswing in consumption (69%).[19] Forecasts suggest growth to continue to increase, led by a 25% increase in demand in China

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[12] Huffington Post, "Top 10 Wine Destinations Around the World", http://www.huffingtonpost.com/viator/top-10-wine-destinations_b_3876855.html

[13] USA Today, "Best Wine Region to Visit: As Chosen by Readers of USA Today and 10Best", http://www.10best.com/awards/travel/best-wine-region-to-visit

[14] Wine Enthusiast Magazine, "10 Best Wine Travel Destinations 2015", http://www.winemag.com/gallery/10-best-wine-travel-destinations-2015

[15] Wines of British Columbia, "Quick Facts, Harvest and Estimated Production", http://www.winebc.org/press_room/statistics

[16] Wines of British Columbia, "Quick Facts, Grape Acreage and Growth in Number of Grape Wineries", http://www.winebc.org/press_room/statistics

[17] Statistics Canada, *Table 301-0008 - Principal statistics for manufacturing industries, by North American Industry Classification System (NAICS), annual (dollars)*

[18] Industry Canada, Trade Data Online, Canadian Total Exports, NAICS 31213 - Wineries

by 2018.[20] The continued rise in Chinese consumption can largely be attributed to rising incomes and a growing middle class with desires for premium products.[21]

Against this global backdrop of increasing demand for wine, the South Okanagan has seen significant interest from foreign and domestic investors (largely from Europe, China, and Alberta) actively seeking opportunities to take ownership stakes in wineries throughout the region.

Given the strong current state of the wine and viticulture sector in the South Okanagan, there are three main opportunities/approaches worth pursuing when attracting new investment to the area:

Attract Investment in Wine-Related Supply Chain Businesses

Given the large number of smaller wineries in the region, there is a need to attract more businesses that can support these smaller wineries to grow their product in a cost effective and locally accessible way. Examples of these services include conducting a nutrient analysis, labelling, sales and marketing services, accessing incubator services to help wine start-ups grow and acquire acreage, processing facilities, and investment in a temperature-controlled distribution facility.

Link Waste from Wineries with Bio-product Operations

New technological innovations are creating opportunities for wineries to convert their waste and compost materials into bioproducts. Examples of this include using grape pomace to create new products such as feed supplements for cattle and other livestock, cream of tartar for baking, and grape seed oil products. Some biofuel energy generation options are also available, though are more capital intensive and limited in their availability.

Target the "Right" Wine Investors and Entrepreneurs

The South Okanagan has attracted significant foreign and domestic investor interest for many years. Some of these investors, however, are absentee and/or are buying on behalf of their children, with little actual knowledge on how to run a successful winery in a very competitive market. Local concerns are also present that some investors do not have the same ethical approach and commitment to creating organic, high quality products eroding the reputation for what the South Okanagan has become well-known for.

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[19] VINEXPO 2015: Main Trends in Canadian Wine and Spirits Market Revealed, http://myvancity.ca/2015/02/18/vinexpo-2015-main-trends-canadian-wine-spirits-market-revealed/

[20] Ibid

[21] Laurie Burkitt, The Wall Street Journal, "As China's Economy Slows, Consumers Pick Up Some of the Slack", November 5, 2015

Focusing on vetting investors and attracting sustainable business ventures to the region is an opportunity to continue to grow the global reputation for wine in the South Okanagan. This sustainable investment goes hand in hand with attracting investors who are looking to live in the region for quality of life purposes.

Other Wineries/Viticulture Opportunities for the South Okanagan

- Booming tourism sector that supports direct sales from the wineries netting a higher profit per bottle sold
- Supporting the South Okanagan to become an agri-tech hub and harnessing new agri-tech developments to increase wine production (e.g. more reliably predicting grape yields each year using data and drones)
- Capitalizing on the continued trend towards premium and "craft" products driven by a consumer preference to avoid purchasing products that are mass produced by large conglomerates. Also, if wine is produced using 100% BC products, there are exemptions to the BC Liquor Board markup (which can be as high as $8 for a $15 bottle of wine) which could have significant cost saving implications to a producer's bottom line.
- Increasing exports to Asia (China in particular) as disposable incomes rise. Positioning "non-trophy" wines (e.g. Bordeaux reds) in the Asian marketplace will be particularly important so as to expand the export potential for a wider variety of BC wine products (including fruit and berry wines).

Lead Generation Networks

A number of lead generation networks exist from which relationships and partnerships can be built when pursuing the opportunities listed above. These networks include trade shows/workshops/conferences, associations and organizations, educational and research support, and government contacts.

Trade Show/Workshop/Conference

Event	Date	Description
18th Annual Enology & Viticulture Conference & Tradeshow	Penticton, BC July 17-18, 2017	This international event provides opportunities to learn about leading edge research and technology for vineyards and wineries and to network with over 300 delegates. The tradeshow is an excellent venue to learn and get advice on new products, supplies, and equipment from more than 100 Exhibitors.

Event	Date	Description
Vancouver International Wine Festival	Vancouver, BC February 11-19, 2017	VanWineFest attracts some of the biggest industry names from around the world and is firmly established as the continent's premier wine event and among the biggest, best and oldest wine events in the world. It features wine tastings and pairings, gourmet dinners and luncheons, educational seminars and culinary competitions.
ProWein International Trade Fair for Wines and Spirits	Dusseldorf, Germany March 19-21, 2017	ProWein is the world's leading trade fair for wine and spirits, the largest industry meeting for professionals from viticulture, production, trade and gastronomy.
International Cool Climate Wine Symposium	St. Catharines, ON July 2020	Established in 1984, the ICCWS focuses on wine production in the cooler climate winemaking regions of the world.
9th Annual International Wine Tourism Conference	Sicily, Italy March 28-29, 2017	IWINETC is the leading global event for the wine and culinary tourism industry, held in grape escape destinations around the world. The 3 day event delivers thought provoking professional education, an extensive exhibition area to discover wine travel destinations and their wines, a focused business environment for tour operators to meet wine tourism experience providers and a chance to discover the wine tourism highlights of the host destination

Associations and Organizations

Name	Description
BC Grape Growers' Association http://www.grapegrowers.bc.ca	The British Columbia Grapegrowers' Association is a non-profit organization that represents all commercial grape producers in British Columbia on agricultural issues and concerns. We work with other industry organizations, with provincial and federal agricultural organizations and all levels of government to represent, promote and advance the interests of all grape growers in British Columbia
BC Wine Institute http://www.winebc.org	The BCWI markets the wine and regions of BC; delivers quality trade, media and consumer tastings; and acts as the voice of BC's wine industry by advocating to government on behalf of industry
BC Wine Grape Council http://www.bcwgc.org	The purpose of the BC Wine Grape Council is to coordinate, facilitate, and fund research and education on viticulture and enology to broadly benefit the British Columbia wine grape industry and to represent growers on a

Name	Description
	variety of agriculture related issues
Canadian Vintners Association http://www.canadianvintners.com	Canadian Vintners Association (CVA) is the national voice of wine in Canada, bringing together our membership to advocate on public policy initiatives by working cooperatively with governments and other stakeholders to find solutions that benefit both society and the entire Canadian wine industry.
Wine Council of Ontario http://winecouncilofontario.ca	The Wine Council of Ontario (WCO) is the champion of Ontario's high quality, authentically local Vintner's Quality Alliance (VQA) wines and of promoting Ontario's wine country as a tourism destination. As a non-profit trade association, the WCO represents over 100 wineries from across the three designated viticultural areas of the province.
Wine China www.winechina.com	The premier resource of China's wine industry, offering everything from breaking news to imbibing tips to updates on recent exhibitions
World Wine Trade Group http://www.wwtg-gmcv.org	The WWTG is an informal association of national representatives of wine producing countries interested in participating in networking and information sharing to provide better access to international wine markets

Educational and Research Support

- Summerland Research and Development Centre
- BC Wine Sensory Lab at Okanagan College
- UBC Wine Research Centre
- Brock University's Cool Climate Oenology and Viticulture Institute (CCOVI)
- Acadia University's Atlantic Wine Institute
- University of California Davis Department of Viticulture & Enology
- Oregon Wine Research Institute
- Washington State University Department of Viticulture and Enology
- The Australian Wine Research Institute

Government Contacts

Organization	Name	Position	Telephone	Email
Government of Canada, Global Affairs Canada	Janet Dorozynski	Trade Commissioner, Canadian Wine, Beer and Spirits and Tourism	343-203-3736	
BC Government, Ministry of International Trade, Natural Resource Sector	Michael Nicholas	Senior Director, Agrifoods and Forestry	604-775-2144	
	Rob Arthurs	Senior Manager, Agrifoods	604-375-5112	

Assets

- Favourable microclimates and soil conditions for wine production in the South Okanagan
- Internationally recognized and known as an area for good quality wine which has led to interest from investors throughout the world (e.g. China, Chile, France)
- Critical mass of primary agriculture producers in the region that can supply winery operations (e.g. grapes and fruit/berries)
- Access to high quality research facilities and support systems (e.g. BC VQA Wine Shop, BC Wine Institute, BC Wine Sensory Lab at Okanagan College, Summerland Research and Development Centre)
- Good access to transportation networks for export (i.e. airports, port of Vancouver)

Land-Based Aquaculture

Context

The global demand for seafood is rising at the rapid rate of 7% to 9% each year.[22] This increase is due largely to the need to feed a growing global population that is becoming wealthier.[23] This increased demand has led to a dramatic decrease in the population of wild seafood stocks.

The World Bank forecasts a 36% increase in global fish consumption from 2008 to 2030.[24] More than half of this increase in consumption is forecast to occur in China (55%), with Southeast Asia (12%), other South Asia (11%), India (11%), and North America (6%) also showing strong growth.[25]

In order to meet this growing demand, aquaculture is playing an ever increasing role in global food systems. Roughly half of the seafood sold worldwide is currently farmed using aquaculture techniques.[26] That share is projected to increase by 98% by 2030 as wild fish stocks continue to fall.[27]

While aquaculture is already a large industry in BC, the majority of those operations use "marine net-pen aquaculture" based in oceans and rivers. These marine based operations have come under massive public scrutiny throughout Canada in recent years due to concerns about their large impacts on the marine environment (including wastes, pesticide impact, and the possibility of farmed fish escaping their pens and endangering wild marine species).

New innovations in the sector have led to more interest in land-based closed-containment aquaculture (with the newest innovation being to recirculate and clean saltwater for use in producing saltwater marine species inland). These land-based systems offer many benefits, including:

- Production of fish **without the need for antibiotics or harsh environmentally harmful chemicals** to control disease and parasites
- **Faster growth of fish stocks**, typically six months ahead of net-pen operations

Spotlight on the Okanagan's "DelicaSea"

Operating out of Oliver, BC, DelicaSea is a family company producing and farming Arctic Char in a closed containment land-based aquaculture system.

Not only is DelicaSea producing Arctic Char for retailers and local restaurants, they have been utilizing and marketing their fish waste as fertilizers to orchardists and grape growers. Their waste product "CharGrow" is currently being utilized by organic farmers to fertilize fruit and vegetable crops (such as cherries).

[22] Canadian Aquaculture Industry Alliance, "Canadian Aquaculture Industry: Jobs, Growth and Economic Opportunity for Canada", Global Growth Strategies for BC Seafood, Aquaculture & Agri-food Products, June 19, 2014

[23] Vannstruth Consulting, "Aquaculture Statistics for Comox Valley & BC", February 2014, http://www.investcomoxvalley.com/businessresources/statisticsandreports.htm

[24] Ibid

[25] Ibid

[26] Ibid, Canadian Aquaculture Industry Alliance

[27] Ibid, Vannstruth Consulting

- **Harvesting of wastes** and the potential to recycle them for use as fertilizer
- **No potential for escape** that jeopardize wild fish conservation and biodiversity
- **Greater flexibility in locating facilities** providing economic growth opportunities to inland communities without sacrificing the environment

As seen in Figure 11, global centres of innovation in land-based aquaculture are largely concentrated in Europe, Chile, and China. In Canada, the Namgis First Nation on Vancouver Island is the only land-based salmon farm in BC and one of the few commercial-scale, land-based salmon farms in the world.

FIGURE 11: GLOBAL CENTRES OF INNOVATION FOR LAND-BASED AQUACULTURE OPERATIONS

Opportunity

The Canadian aquaculture sector is a $2.75 billion industry (with BC being one of the top provinces).[28] BC's exports of fish and seafood products were valued at $911 million in 2011.[29] Roughly 57% of those exports were to the United States, with Japan, China, Russia, and South Korea also playing prominent roles. Export levels to South Korea and China in particular have grown tremendously over the past decade, increasing by a factor of seven and four respectively. [30]

[28] Ibid, Canadian Aquaculture Industry Alliance
[29] BC Stats, "British Columbia's Fisheries and Aquaculture Section, 2012 Edition", Section 11 – International Trade in Fish & Seafood Products
[30] Ibid, Canadian Aquaculture Industry Alliance

Taken altogether, demand for current Canadian aquaculture products and services far exceed the current supply.[31]

Technology in support of land-based aquaculture operations is quickly becoming more reliable and cost effective. With increasing global demand for fish (especially in Asian markets) and the growing interest in select high value seafood items (such as geoduck in China, pronounced “goey duck”), investments in land-based aquaculture operations in the South Okanagan offer growing opportunities for the region.

Further developments in the cultivation of sea plants linked to the development of industries such as nutraceuticals and food additives, and the development of inland aquaculture facilities producing saltwater marine species also offer important opportunities for investors in the sector.

Other Land-Based Aquaculture Opportunities for the South Okanagan

- Investing in the region’s seafood processing capacity
- Connecting seafood waste with commercial and industrial processes to create bio-products and new revenue streams for producers
- Investigating the feasibility of having a temperature-controlled distribution facility to facilitate seafood export logistics in the region
- Working more closely with the Summerland Research and Development Centre to develop new processes to convert products from the seafood industry into new products to support agricultural operations in the region[32]
- Marketing and branding the South Okanagan as a hub of organic and clean foods to foreign investors

Lead Generation Networks

A number of lead generation networks exist from which relationships and partnerships can be built when pursuing the opportunities listed above. These networks include trade shows/workshops/conferences, associations and organizations, educational and research support, and government contacts.

[31] Ibid, Canadian Aquaculture Industry Alliance

[32] For example, Bell Aquaculture (based in the U.S.) has developed an innovative and revenue-creating conversion of fish processing offal and thickened fish manure into marketable organic fertilizers and soil amendments

Trade Show/Workshop/Conference

Event	Date	Description
International Conference on Recirculating Aquaculture/Aquaculture Innovation Workshop	August 2016 Roanoke, Virginia	A gathering of aquaculture producers, scientists, engineers, aquaculture industry suppliers, regulators and investors on land-based closed-containment systems using recirculating aquaculture system (RAS) technology.
Aquaculture Canada & Cold Harvest	September 2016 St. John's, Newfoundland	The conference will highlight advances in science and technology of Canadian aquaculture, in preparing for the sustainable food systems of the future.
Seafood Expo North America	March 2017 Boston, Massachusetts	Seafood Expo North America/Seafood Processing North America is North America's largest seafood exposition. Attending buyers represent importers, exporters, wholesalers, restaurants, supermarkets, hotels, and other retail and foodservice companies. Exhibiting suppliers offer the newest seafood products, processing and packaging equipment, and services available in the seafood market
Seafood Expo Global	April 2017 Brussels, Belgium	More than 26,000 buyers, suppliers, media, and other seafood professionals from more than 140 countries visit the exposition. Attendees come to meet with existing suppliers, source new products and network with other industry professionals.
China Fisheries & Seafood Expo (CFSE)	November 2017 Qingdao, China	China Fisheries & Seafood Expo has been helping seafood companies from around the world grow their business in the world's largest and fastest-growing seafood market. Featuring 30,000 square meters of exhibit space and more than 25,000 visitors from almost 100 countries.
Seafex	November 2016 Dubai, U.A.E	Held alongside The Speciality Food Festival and Gulfood Manufacturing, SEAFEX offers exposure to the emerging and developing fine and gourmet markets as well as ingredients and manufacturing segments.

Associations and Organizations

Name	Description
Aquaculture Association of Canada http://www.aquacultureassociation.ca	AAC is a registered charity with a mandate to transfer information between the various sectors of the aquaculture community.
Canadian Aquaculture Industry Alliance http://www.aquaculture.ca	A national industry association, headquartered in Ottawa, that represents Canadian aquaculture operators, feed companies and suppliers, as well as provincial finfish and shellfish aquaculture associations
Atlantic Salmon Federation http://www.asf.ca	The Atlantic Salmon Federation is dedicated to the conservation, protection and restoration of wild Atlantic salmon and the ecosystems on which their well-being and survival depend.
World Aquaculture Society https://www.was.org	The World Aquaculture Society, through its commitment to excellence in science, technology, education, and information exchange, will contribute to the progressive and sustainable development of aquaculture throughout the world.
Freshwater Institute at the Conservation Fund http://www.conservationfund.org	The Freshwater Institute specializes in the production technology and design of aquaculture systems; and in solutions to the water quality constraints and impacts presented by farms and communities.
BC Salmon Farmers Association http://bcsalmonfarmers.ca	The BC Salmon Farmers Association is a forum for communication and cooperation within the salmon farming sector, and the focal point for liaison between the industry and government.
BC Shellfish Growers Association http://bcsga.ca	Proud to offer information about the shellfish farming industry in British Columbia, from how we grow our products to our association and the people involved.
Investment Agriculture Foundation of BC http://iafbc.ca	Offers a variety of programs to assist the agriculture and food processing industries in BC.
Tides Canada http://tidescanada.org	As a national charity, we connect and empower a wide range of people and initiatives across the country to take on tough social and environmental challenges, building a stronger Canada. Provided a $3.2 million great for the Kuterra sustainable fishery.
Aquaculture Engineering Society https://www.aesweb.org	The Aquaculture engineering society (AES) works closely with other professional societies which also address aquaculture needs and issues in a

Name	Description
	more general sense. AES serves as a united voice for aquacultural engineering in the general aquacultural community and provides an engineering perspective to the problems and proposed solutions to these problems.

Educational and Research Support

- Canadian Aquaculture Institute
- SAFEGARD Aquatic Research Laboratory/InSEAS
- Vancouver Island University Fisheries & Aquaculture Program
- Aquaculture Collaborative Research and Development Program (ACRDP
- Aquaculture Centre (University of Guelph)
- Centre for Aquaculture and Seafood Development (C-ASD)
- Centre for Shellfish Research - Vancouver Island University
- Sustainable Aquaculture Program

Government Contacts

Organization	Name	Position	Telephone	Email
BC Government, Ministry of Trade and Investment	Myron Roth	Industry Specialist, Aqua & Seafood	250-356-1831	Myron.Roth@gov.bc.ca
	Linda Wilson	Emerging Opportunities Coordinator	604-556-3057	Linda.Wilson@gov.bc.ca
	Sean Cheesman	Marine Information Specialist	250-356-1837	Sean.Cheesman@gov.bc.ca
Government of Canada,The Canadian Trade Commissioner Service	Sudha Kshatriya	Sustainable Technologies		pacific-pacifique.tcs-sdc@international.gc.ca
	Marilyn Denton	Ocean Technologies		pacific-pacifique.tcs-sdc@international.gc.ca

Assets

- InSEAS* laboratory at the UBC campus
- Centre for Shellfish Research - Vancouver Island University
- Vancouver Island University Fisheries & Aquaculture Program and Extension Program
- Availability of land and greenfield ready for investment (most especially on Indian Band lands)
- DelicaSea (a family company producing Road 17 Arctic Char) based out of Oliver

Agri-Tech

Context

Agri-tech is a relatively old concept: to use technology to improve agricultural efficiencies. Modern day agri-tech, however, is transforming the agricultural sector in radically new ways, such as using biochemistry and big data analytics. The use of wireless networks to monitor weather, detect and manage pests as well as the use of unmanned aerial vehicles to help farmers better manage their irrigation strategies and predict crop growth patterns.

Agri-tech innovators and entrepreneurs from BC are well known internationally. They benefit from strong sector resources in the province, including:

- **A thriving tech community** that is in close proximity to agricultural operations in the lower mainland. This means the sector is well positioned geographically to develop and pilot various new solutions.
- **Unique commercialization and research centers and top universities** that attract, coach, and train some of the most talented and innovative people working in the agri-tech sector
- A diversity of crop mixes and landscapes that offer **a unique opportunity to respond to and design for a wide range of agricultural needs** that have global potential
- **Government supports** that accelerate the pace of innovation by supporting research and development activities and facilitate the demonstration, commercialization, and adoption of new technologies

Examples of leading BC companies already working in the agri-tech sector include:

- **Agri-food Information Management Tools –** The integration of productivity software or applications, such as Farm At Hand and ICICLE by Burton Software, are helping BC farmers combine information management tools into their day-to-day activities with the aid of computer and mobile devices to track their operational activities
- **Wireless Crop Monitoring –** Ecoation Innovative Solutions is one of two Vancouver-based companies that have successfully developed innovative pest management technologies and mobile sensory system that combine biochemistry, big data analytics, and wireless networks to automatically detect and manage a range of common and costly agricultural pests without the use of chemical pesticides
- **Precision Agriculture Using Unmanned Aerial Vehicles (UAV'S) –** In Surrey, a start-up company called Artemis Technology is developing agricultural drones that can collect aerial images to gather data analytics using image recognition software to help farmers predict growth patterns, detect diseases, and reduce the required treatments necessary for crops

- **Food and Nutraceutical Quality and Safety –** Mazza Innovation has developed a clean extraction technology that can acquire 100% of beneficial plant ingredients that are free from any residual solvents and incorporate them into a wide range of functional foods, dietary supplements, and beauty products

Opportunities

There are a number of emerging agri-tech companies in BC that all need demonstration sites and facilities for their innovations. These sites and facilities need to be in a place where a lot of agriculture is happening. Building on the large presence of primary agricultural producers in the region (e.g. agri-food, viticulture, bio-products), the South Okanagan has a good opportunity to position itself as a hub for agri-tech activity. Establishing a Centre of Excellence for agri-tech in the South Okanagan would help to position the region as that hub.

Agri-tech companies are also being "pushed away" from the lower mainland by prohibitively expensive costs of doing business (largely attributed to land availability and rental space). Agri-tech companies could benefit greatly from the much more affordable business environment in the South Okanagan. Some anecdotal evidence suggests that there has already been interest by certain foreign investors to establish an agri-tech business park within the South Okanagan.

Other Agri-Tech Opportunities in the South Okanagan

- Land-based aquaculture operations
- Investing in the region's food processing capacity to add value to raw inputs before exporting, with the potential of also creating and exporting more packaged food products
- Connecting agricultural waste with commercial and industrial processes to create bio-products and new secondary revenue streams for producers
- Working more closely with the Summerland Research and Development Centre to develop new processes to convert agricultural research into new commercialization ideas

Lead Generation Networks

A number of lead generation networks exist from which relationships and partnerships can be built when pursuing the opportunities listed above. These networks include trade shows/workshops/conferences, associations and organizations, educational and research support, and government contacts.

Trade Shows/Events

Event	Date	Description
Agri Investment Forum	Toronto, ON May 2016	Agri Investment Forum (AIF) is now the only Annual AgTech Investment Forum for the entire industry value chain, hosted in Canada. The Forum brings together active institutional and private investors with leading edge entrepreneurs and commercialization professionals.
World Congress of Food Science and Technology (IUFoST)	Dublin, Ireland August 2016	The International Union of Food Science and Technology (IUFoST) supports programmes and projects to increase the safety and security of the world's food supply. The theme of this year's World Congress is "Greening the Global Food Supply Chain through Innovation in Food Science and Technology".
Ag Innovation Showcase	St. Louis, USA September 2016	The showcase facilitates high-level dialog and deal-flow between Ag's heavy hitters across this year's themes of precision agriculture, biologicals and early stage investing in the space, in addition to highlighting technology solutions across ag-bio, renewable energy, sustainable materials, food production, animal health and farming technologies.
CFIG: Grocery Innovations Canada	Toronto, ON October 2016	With independent grocers representing approximately 30% of the sector, exhibitors will get their products in front of key decision makers at the show. Grocery Innovations Canada is the premier grocery & specialty food show. In addition, the event will offer exhibitors the OPTION to sell on the floor increasing opportunities between trading partners and their suppliers.
World Agri-Tech Investment Summit	London, UK November 2016	Global agribusinesses, VC investors and technology start-ups from around the world come together to uncover the most exciting innovations in agricultural technology – and to forge the right partnerships to take those solutions to market. Attracting delegations from the US, Europe, the Middle East and Africa, this is a summit where connections are made: accelerating the transition of technology from the lab to the field.
FarmTech	Edmonton, AB January –	FarmTech is Canada's premier crop production and farm management

Event	Date	Description
	February 2017	conference. FarmTech features more than 50 sessions featuring a world class lineup of speakers providing delegates with everything from global knowledge to local perspectives. The Agricultural Showcase is the hub of activity at the show and features the latest in products and services for crop producers.
BC Tech Summit	Vancouver, BC March 14-15, 2017	Showcasing BC's vibrant technology industry, the summit provides an opportunity to build cross-sector opportunities for your business, expand your network and explore the latest ideas that will drive competitive advantage.

Industry Associations/Organizations

Name	Description
BC Innovation Council (BCIC) http://bcic.ca	The BCIC encourages the development and application of advanced or innovative technologies to meet the needs of all industries in B.C. The BCIC accelerates technology commercialization by supporting start-ups and developing entrepreneurs. BCIC delivers programs and initiatives that promote company growth, resulting in jobs, increased revenue and economic development in BC.
BC Agricultural Research & Development Corporation (ARDCorp) https://www.bcac.bc.ca/ardcorp	ARDCorp leads innovation and delivers resources to improve the long-term profitability of B.C. farmers and ranchers with the vision to grow B.C. into the most dynamic and robust agricultural province in Canada.
Sumas Regional Consortium for High Tech (SRCTec) http://srctec.org	The SRCTec is a non-for-profit organization governed by a select group of technology executives that form a volunteer board of directors. SRCTec is a coalition of local government, industry partners and high education institutions interested in attracting tech based investment into the "Region" (including the District of Mission, City of Abbortsford and Chilliwack)
BC Investment Agriculture Foundation (IAF) http://iafbc.ca	IAF is an industry-led, not-for-profit organization representing the agriculture, food processing, farm supply and post farm gate sectors across British Columbia. Their mission is to assist British Columbia's producers, processors, agri-businesses and rural communities to develop solutions and seize opportunities.
BC Agriculture Council (BCAC)	The BCAC represents over 14,000 BC farmers and ranchers and close to

Name	Description
https://www.bcac.bc.ca	thirty farm sector associations from all regions of the province. Their mission is to continually improve the social, economic and environmental sustainability of B.C. Agriculture.
Canadian Federation of Agriculture (CFA) http://www.cfa-fca.ca	The CFA's mission is to promote the interests of Canadian agriculture and agri- food producers, including farm families, through leadership at the national level and to ensure the continued development of a viable and vibrant agriculture and agri-food industry in Canada.
BC Food Processors Association (BCFPA) https://www.bcfpa.ca	The BCFPA is dedicated to, and to help the industry achieve economic prosperity and sustainable safe production. The BCFPA represents micro, small, medium, and large processing companies, and since 2004 has grown to over 300 members.

Educational and Research Support

- Bioenterprise B.C.
- University of the Fraser Valley – Agriculture Centre of Excellence
- Summerland Research and Development Centre
- B.C. Agri-food Venture Acceleration Program
- Kwantlen Polytechnic University – Institute for Sustainable Food Systems
- Thompson Rivers University – Applied Sustainable Ranching
- Vancouver Island University – Agriculture Resource and Innovation Centre
- Lambton College – Bio-Industrial Process Research Centre
- Niagara College – Research & Innovation division
- Growing Forward II Federal/Provincial grant program

Government Contacts

Organization	Name	Position	Telephone	Email
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Organization	Name	Position	Telephone	Email
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The Canadian Trade Commissioner Service	Ryan Kuffner	Agriculture and Processed Foods	1-888-306-9991	ryan.kuffner@international.gc.ca
	Mona Taylor	Agriculture and Processed Foods	1-888-306-9991	mona.taylor@international.gc.ca
	Sandra McRae	Science and Technology	1-888-306-9991	pacific-pacifique.tcs-sdc@international.gc.ca
	Carolyn Bailey-Ling	Sustainable Technologies	1-888-306-9991	pacific-pacifique.tcs-sdc@international.gc.ca

Assets

- Summerland Research Centre – Pacific Agri-Food Research Centre
- Sumas Regional Consortium for High Tech (SRCTec)
- University of the Fraser Valley – Agriculture Centre of Excellence
- Ample agriculture and winery businesses in the region that would be interested in harnessing new efficiencies for their operations
- Strong quality of life offerings to help draw entrepreneurs to the region to establish their businesses (especially young ones)

Clean Tech

Context

In 2013, the global environmental sector[33] (in which the clean tech sector is a large part) grew by 3.6%, generating revenues of just over $1 trillion.[34] These global revenues in the sector are expected to grow to $3 trillion by 2020.[35] The top three segments accounting for the majority of this revenue were water utilities ($167.1 billion), clean energy systems and power ($164.7 billion), and solid waste management ($163.8 billion). Clean energy was the fastest growing among these three categories.[36]

The global demand for clean technologies has been rising quickly over the past decade, driven largely by concerns about clean water, clean air, climate change, and rapid urbanization. This has led to a radical rethinking by governments on how certain challenges are solved. Forecasts suggest that growth within the environmental sector will continue to be strong, with demand expected to grow mostly in the areas of clean technologies and green energy (e.g. biomass, solar, wind, and water).[37]

The clean tech sector is a very competitive sector, with countries such as Germany, Australia, the United States, and Israel leading the world (as seen in Figure 12). Any jurisdiction looking to remain competitive in this global marketplace needs to be investing heavily in research and development, commercialization of new technologies, and development of a highly skilled labour force needed to maintain or increase global market share.[38]

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[33] As defined by Statistics Canada, the environmental industry is composed of establishments operating in a variety of industries that produce environmental goods and services that are used, or can potentially be used to measure, prevent, limit, or correct environmental damage. They include clean or resource-efficient (eco-efficient) technologies that decrease material inputs, reduce energy consumption, recover valuable by-products, reduce emissions, and/or minimise waste disposal problems

[34] Environmental Business International, “Global Environmental Industry Grows 3.6% to Over $1 Trillion in Revenues”, http://ebionline.org/updates/3049-global-environmental-industry-grows-to-over-1-trillion-in-revenues

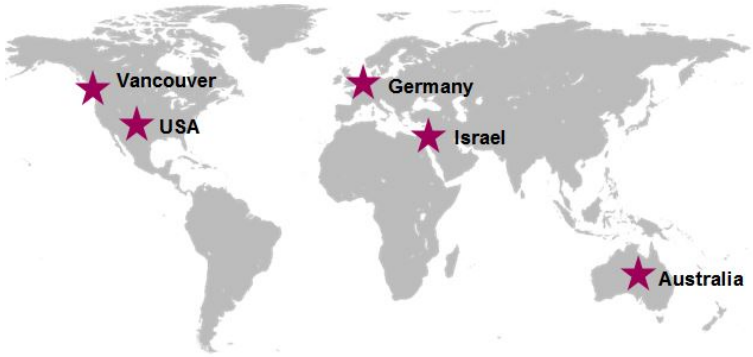
[35] Trade and Invest British Columbia, Government of British Columbia, “Clean Technology”, https://www.britishcolumbia.ca/invest/industry-sectors/technology/clean-technology

[36] Ibid, Environmental Business International

[37] Industry Canada, “Canada’s Environmental Industry: An Overview”

[38] Environmental Careers Organization Canada (ECO), “Canadian Environmental Sector Trends: Labour Market Study”, 2010

FIGURE 12: GLOBAL LEADERS IN CLEAN TECH INNOVATION



Opportunity

The Canadian clean tech sector has over 775 companies (more than the Canadian aerospace sector or automotive sector), and employed 55,600 people in 2014 (an increase of 11% from 2013).[39]

In 2014, Canadian clean tech revenues were an estimated $11.63 billion, $1.7 billion of which came from BC companies.[40] Vancouver is one of the world's top 10 clean tech clusters, recognized for fuel cell solutions, power electronics, and waste/wastewater treatment technologies (it is home to the world's largest hydrogen and fuel cell industry with a 16% global market share).[41] Approximately 70% of BC's 200 clean tech companies are based in Vancouver.

With the relative decline of the Canadian dollar in 2014, the proportion of Canadian clean tech companies actively exporting grew to 87% (up from 68% in 2013), and is forecast to grow to 91% of companies by 2016.[42] Many Vancouver-based clean tech companies are already successfully exporting their products (most especially to US and Asian markets). These existing export relationships bode well for BC clean tech companies as the US is the largest global market, followed by Western Europe, and Japan.[43] China, for its part, unveiled a "green plan" in 2011 setting ambitious targets to increase non-fossil fuel energy

[39] Analytica Advisors Inc., "2016 Canadian Clean Technology Industry Report: Synopsis"
[40] Trade and Invest British Columbia, Government of British Columbia, "Clean Technology", https://www.britishcolumbia.ca/invest/industry-sectors/technology/clean-technology
[41] Vancouver Economic Commission, "Clean Tech", http://www.vancouvereconomic.com/vecs-focus-areas/clean-tech
[42] Ibid, Analytica Advisors Inc.
[43] Ibid, Environmental Business International

consumption, cut industrial water consumption, and cut energy consumption.[44] BC based companies such as Ballard Power Systems are already benefitting from resulting contracts in China (in this case to produce hydrogen fuel cell buses).

With more than $12.2 billion included in the federal budget over the coming years allocated for climate related programs and investments in infrastructure, the Canadian clean tech sector is poised to continue growing and positioning itself as an important part of the Canadian economy.[45]

Clean Tech Opportunities for the South Okanagan

- Incentivizing the inclusion of clean tech demonstration sites in municipal infrastructure planning. There is currently a large shortage of demonstration sites throughout BC which limits the ability for clean tech companies to sell their technology and find investors.
- Solar power generation given the climate in the region (especially with battery technology improving in recent years)
- Attracting Vancouver based clean tech companies to the region and/or creating partnerships to help supply their business needs.
- Creating partnerships between municipalities and First Nations communities to harness available industrial lands
- Attracting foreign entrepreneurs looking to invest in BC companies at a ground level to evolve technology to a scale that can be applied back in their home country. Many foreign entrepreneurs are interested to come to BC for quality of life reasons, invest in strong technology, and scale it up to bring back home.

Lead Generation Networks

A number of lead generation networks exist from which relationships and partnerships can be built when pursuing the opportunities listed above. These networks include trade shows/workshops/conferences, associations and organizations, educational and research support, and government contacts.

[44] Ibid
[45] Ibid, Analytica Advisors Inc.

Trade Show/Workshop/Conference

Event	Date	Description
WEFTEC	New Orleans, USA September 24-28, 2016	WEFTEC®, the Water Environment Federation's Annual Technical Exhibition and Conference, is the biggest meeting of its kind in North America and offers thousands of water quality professionals from around the world the best water quality education and training available today. Also recognized as the world's largest annual water quality exhibition, WEFTEC's massive show floor provides unparalleled access to the field's most cutting-edge technologies and services.
TechConnect World Innovation Conference & Expo	Washington, DC, USA 2017	An annual event uniquely designed to accelerate the commercialization of innovations out of the lab and into industry
CleanTech Forum	San Francisco, USA 2017 Helsinki, Finland, 2017	Cleantech Forum continues to be the place to create connections, to connect the dots across multiple industrial sectors being disrupted by information, bio and clean technology innovations, and to enjoy the annual Forum Awards dinner, the gathering of the leading upstarts, investors and incumbent corporations.
13th International Conference on Envirotech, Cleantech and Greentech	Lisbon, Portugal May 25-26, 2017	An intellectual hub for academic discussions and participants to present new research, exchange information, and discuss current issues.
International Conference on Renewable Energy and Resources	Vancouver, BC July 24-26, 2017	Aims to provide a platform which brings together researchers/scientists to share and globalize their research work while the participants from industry can promote their products thus felicitating dissemination of knowledge.
Power-Gen International	Orlando, USA December 13-15, 2017	As the World's Largest Power Generation Event, POWER-GEN International is the industry leader in providing comprehensive coverage of the trends, technologies and issues facing the generation sector. Displaying a wide variety of products and services, POWER-GEN International represents a horizontal look at the industry with key emphasis on new solutions and innovations for the future.
BC Water & Waste Association 45th Annual Conference & Trade Show	Victoria, BC May 27-30, 2017	
National Water and	Toronto, ON	From funding, to communicating to politicians, to dealing with the media

Event	Date	Description
Wastewater Conference	November 13-16, 2016	and influencing public behaviour, one of the biggest challenges for utility managers is communicating the importance of water and wastewater infrastructure. Join us to explore how we can put water centre stage, and keep it there.
3rd International Congress on Biofuels and Bioenergy	Toronto, ON October 2-4, 2017	Covers a broad range of topics that helps researchers to explore the advancements in the field of Biofuels and Bioenergy

Associations and Organizations

Name	Description
Global Cleantech Cluster Association http://www.globalcleantech.org	Focus on creating a global cluster collaboration system to drive sustainable regional economic development that is open, larger and more effective than what is generally available today.
TechConnect http://www.techconnect.org	A global technology outreach & development organization that vets and delivers the world's most promising technologies to the world's top corporate, government and investment developers
MaRS Cleantech https://www.marsdd.com/our-sectors/cleantech	Help grow disruptive, high-impact businesses by connecting innovators, potential partners, customers, investors, talent and seed capital. MaRS Cleantech comprises three main entities — Venture Services, ArcTern Ventures and the Advanced Energy Centre — together providing a one-stop shop for industry stakeholders.
CleanTech North http://cleantechnorth.com	The primary recognized source of support for the Canadian clean technology community and a key catalyst for the growth and sustainability of the clean technology sector in Canada.
CleanTech Community Gateway http://ctcg.org	A not-for-profit organization of public and private sector partners collaborating to develop and deploy clean energy solutions within rural and remote communities
BC Sustainable Energy Association http://www.bcsea.org	A non-profit society promoting the sustainable use and production of energy in British Columbia.

Name	Description
BC Bioenergy Network http://www.bcbusiness.ca/bc-bioenergy-network	An industry-led association to develop and demonstrate sustainable bioenergy technologies.
Kootenay Association for Science and Technology http://kast.com	Promotes science, technology and innovation to stimulate entrepreneurial and economic development.
Foresight Cleantech Accelerator Centre http://foresightcac.com	Western Canada's first clean technology accelerator. A not-for-profit corporation to foster the growth of small and medium size businesses (SMEs) in the development and commercialization of viable technology solutions to create and produce energy more efficiently and responsibly.
Canadian Water and Wastewater Association http://www.cwwa.ca	CWWA is a non-profit national body representing the common interests of Canada's public sector municipal water and wastewater services and their private sector suppliers and partners. CWWA is recognized by the federal government and national bodies as the national voice of this public service sector.
BC Water & Waste Association https://www.bcwwa.org	A not-for-profit organization that represents over 4,600 water professionals, ensuring that water users, regulators and elected officials make informed decisions about water services, the BC & Yukon region has a competent and sustainable water sector workforce and an influential and cohesive network of water practitioners, and leadership and innovation is fostered within the water community.
Sustainable Development Technology Canada https://www.sdtc.ca	Fund Canadian cleantech projects and coach the companies that lead them as they move their ground-breaking technologies to market.

Educational and Research Support

- Okanagan College's Jim Pattison Centre for Excellence in Sustainable Building Technologies and Renewable Energy Conservation

- CleanTech Impact Centre, University of Toronto
- Canadian Institute for Advanced Research
- MIT Clean Energy Prize
- Imperial College London Energy Futures Lab
- Green University of Tokyo Project
- Energy Biosciences Institute at University of California at Berkeley
- Solar Energy Research Institute of Singapore
- University of Minnesota Institute on the Environment
- Tel Aviv University Supercenter for Renewable Energy
- Center for a Sustainable Future at Cornell University
- Australian National University Centre for Sustainable Energy Systems
- University of Melbourne Energy Research Institute

Government Contacts

Organization	Name	Position	Telephone	Email
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	Viktoria Palfi	Trade Commissioner, Cleantech	416-973-5158	
BC Ministry of International Trade, Technology and Innovation Sector	Harbs Bains	Senior Manager, Clean Technology	604-660-2241	
	Javed Haque	Senior Manager, Transportation Emerging Technologies	604-775-2187	

Assets

- Okanagan College's Jim Pattison Centre for Excellence in Sustainable Building Technologies and Renewable Energy Conservation
- Close proximity to an active and world leading clean tech hub in Vancouver
- Strong quality of life to help sell the region to entrepreneurs looking to invest in a place they also want to live
- Good manufacturing and professional services base in the South Okanagan to support the clean tech sector
- Competitive cost of doing business (e.g. labour, real estate, taxes)