



Canada Economic Development for Quebec Regions

Performance Report

For the period ending
March 31, 2000

Canada

Improved Reporting to Parliament Pilot Document

The Estimates of the Government of Canada are structured in several parts. Beginning with an overview of total government spending in Part I, the documents become increasingly more specific. Part II outlines spending according to departments, agencies and programs and contains the proposed wording of the conditions governing spending which Parliament will be asked to approve.

The *Report on Plans and Priorities* provides additional detail on each department and its programs primarily in terms of more strategically oriented planning and results information with a focus on outcomes.

The *Departmental Performance Report* provides a focus on results-based accountability by reporting on accomplishments achieved against the performance expectations and results commitments as set out in the spring *Report on Plans and Priorities*.

©Minister of Public Works and Government Services Canada — 2000

Available in Canada through your local bookseller or by mail from

Canadian Government Publishing — PWGSC

Ottawa, Canada K1A 0S9

Catalogue No. BT31-4/40-2000

ISBN 0-660-61415-4



Foreword

On April 24, 1997, the House of Commons passed a motion dividing on a pilot basis the *Part III of the Estimates* document for each department or agency into two separate documents: a *Report on Plans and Priorities* tabled in the spring and a *Departmental Performance Report* tabled in the fall.

This initiative is intended to fulfil the government's commitments to improve the expenditure management information provided to Parliament. This involves sharpening the focus on results, increasing the transparency of information and modernizing its preparation.

The Fall Performance Package is comprised of 83 Departmental Performance Reports and the President's annual report, *Managing for Results 2000*.

This ***Departmental Performance Report***, covering the period ending March 31, 2000 provides a focus on results-based accountability by reporting on accomplishments achieved against the performance expectations and results commitments as set out in the department's *Report on Plans and Priorities* for 1999-00 tabled in Parliament in the spring of 1999.

Results-based management emphasizes specifying expected program results, developing meaningful indicators to demonstrate performance, perfecting the capacity to generate information and reporting on achievements in a balanced manner. Accounting and managing for results involve sustained work across government.

The government continues to refine its management systems and performance framework. The refinement comes from acquired experience as users make their information needs more precisely known. The performance reports and their use will continue to be monitored to make sure that they respond to Parliament's ongoing and evolving needs.

This report is accessible electronically from the Treasury Board Secretariat Internet site: <http://www.tbs-sct.gc.ca/rma/dpr/dpre.asp>

Comments or questions can be directed to the TBS Internet site or to:

Planning, Performance and Reporting Sector
Treasury Board Secretariat
L'Esplanade Laurier
Ottawa, Ontario, Canada
K1A 0R5
Tel: (613) 957-7167
Fax (613) 957-7044

Canada Economic Development for Quebec Regions

*Performance Report
for the period ending
March 31, 2000*

John Manley

**Minister Responsible for the
Economic Development Agency of Canada
for the Regions of Quebec**

TABLE OF CONTENTS

	Page
PART I MESSAGES	1
1.1 Minister's Portfolio Message	1
1.2 Message from the Secretary of State	3
PART II AGENCY PERFORMANCE	5
2.1 Quebec economic context	5
2.2 Performance expectations	7
2.3 Performance achievements	9
2.3.1 Presentation of Financial Information for 1999-2000	9
2.3.2 Agency activities' Performance	11
2.3.2.1 The growth of small- and medium-sized enterprises in every region of Quebec	11
2.3.2.2 The growth of the economic development capabilities of the regions of Quebec	23
2.3.2.3 The economic development of local communities in Quebec	28
2.3.2.4 The adjustment of disrupted economies in Quebec	30
2.3.3 Job creation and maintenance	32
2.3.4 Measurement of client satisfaction	34
2.3.5 Lessons learned from recent evaluations and audits	37
PART III CONSOLIDATED REPORTING	39
3.1 Year 2000 preparedness	39
3.2 Sustainable development	39
PART IV FINANCIAL PERFORMANCE	43
4.1 Overview	43
4.2 Financial summary tables	43

PART V	AGENCY OVERVIEW	53
5.1	Mandate, responsibilities and roles	53
5.2	Operating framework	53
5.3	Agency organization	54
5.4	Program summary	54
5.5	Business volume	55
5.6	Organization chart	57
PART VI	OTHER INFORMATION	59
6.1	Contact for further information	59
6.2	Legislation administered	59
6.3	References	60
6.4	Corporate documents	62
6.5	Regional Documents	62
6.6	Other Documents	63
PART VII	APPENDICES	65
Appendix I	Explanation of financial discrepancies	66
Appendix II	Intermediaries and partners	69
Appendix III	Agency quality policy	73
INDEX		75

LIST OF ACRONYMS AND ABBREVIATIONS

BDCs	Business Development Centres
CAP	Community Access Program
CBSCs	Canada Business Service Centres
CSBFA	Canada Small Business Financing Act
CEDCs	Community Economic Development Corporations
CEFRIO	Centre francophone d'informatisation des organisations
CESAM	Centre d'expertise et de services en applications multimédias
CFDCs	Community Futures Development Corporations
CFP	Community Futures Program
CPLQ	Centre de promotion de logiciels québécois
CQF	Fund for Coastal Quebec
CRCHUM	Centre de recherche du Centre hospitalier de l'Université de Montréal
CRIM	Centre de tests du logiciel du Centre de recherche informatisée de Montréal
CTN	Canadian Technology Network
DFAIT	Department of Foreign Affairs and International Trade
ERAP	Economic Recovery Assistance Program
EQRE	Eastern Quebec Rural Enterprise
HEC	École des Hautes Études Commerciales
IDEA-SME	Innovation, Development, Export Marketing and Entrepreneurship SME
IDM	Institut de design de Montréal
ISM	Internationaux du sport de Montréal
MAMMQ	Ministère des affaires municipales et de la métropole du Québec
NEBS	New Exporters to Border States
NEXPRO	New Exporter Training and Counseling Program
NRC	National Research Council of Canada
OECD	Organisation for Economic Co-Operation and Development
OIQ	Ordre des ingénieurs du Québec
PEMD	Program for Export Market Development
Poly	École Polytechnique
RSI	Regional Strategic Initiatives Program
SBLA	Small Business Loans Act
SDS	Sustainable Development Strategy
SMEs	Small- and medium-sized enterprises
TERP	Temporary Economic Reconstruction Program
UdM	Université de Montréal
WTC	World Trade Centre

PART I MESSAGES

1.1 Minister's Portfolio Message

Canada stands at the threshold of the new century as a world leader in the new economy, an economy fundamentally different from that of even ten years ago. In the past decade, we have seen unprecedented changes around the world, and Canada has moved quickly to take advantage of the opportunities offered. The forces of globalization mean that we are no longer competing locally, or even regionally, but with economies around the globe. And the pace of change has accelerated at a dizzying speed. New electronic communications and information technologies have hastened our transformation into a knowledge-based economy, where skilled workers are our most significant resource and innovation is the key to success. Canada is in the vanguard of this, and our economy is strong and dynamic.

The Industry Portfolio is ...

Atlantic Canada Opportunities Agency
Business Development Bank of Canada*
Canadian Space Agency
Competition Tribunal
Copyright Board Canada
Canada Economic Development for Quebec Regions
Enterprise Cape Breton Corporation*
Industry Canada
National Research Council Canada
Natural Sciences and Engineering Research Council of Canada
Social Sciences and Humanities Research Council of Canada
Standards Council of Canada*
Statistics Canada
Western Economic Diversification Canada

** Not required to submit Performance Reports*

The Government of Canada identified the challenges and opportunities of the new economy at an early stage, and we have been following a clear plan to capture its benefits for all Canadians. A key element of this agenda is investing in research and knowledge, and strengthening Canada's capacity for innovation, in order to increase productivity and to create well-paying jobs to improve our standard of living. We are also investing heavily in human resources, developing the knowledge workers we will need for the economy to continue to thrive, and fostering an entrepreneurial business climate. And we are working to make Canada the most connected country in the world, to maintain our position as a leader in the use of the Internet.

As Minister of Industry, I am responsible for the Industry Portfolio which consists of fourteen departments and agencies that play a key role in delivering on the government's

agenda. With over 40% of federal government spending on science and technology, and a wide range of complementary programs to help businesses both large and small thrive and prosper, the Industry Portfolio represents a powerful toolkit for the government as it leads Canada's transition to the new knowledge-based economy and society.

I am pleased to present this Performance Report for the Economic Development Agency of Canada for the Regions of Quebec, which shows its contribution to the government's agenda by setting out the commitments made in its Report on Plans and Priorities, and its success in meeting them over the 1999-2000 fiscal year.

The Agency continued its improvement of access to information in order to provide existing and future entrepreneurs with relevant information and the particularities of programs and services intended to them. The Agency worked towards its objectives of increasing services to the public and expanding them to cover the entire province through partnerships with a number of Chambers of Commerce. Nineteen new points of service have been established, providing increased access to Government of Canada services. The Agency has fostered the creation of 6,263 new jobs and the maintenance of 6,105 others through its activities in support of Quebec enterprises. The Agency has been diligent in carrying out its mission of providing support for regional economies and for the transition towards the knowledge-based economy.

Working together to invest in our people and our future, we are making our country a stronger and more prosperous place for all Canadians. I am proud of the Industry Portfolio's significant contributions toward meeting these government priorities.

The Honourable John Manley

1.2 Message from the Secretary of State

We are all part of a dynamic new economy, characterized by the unrestrained progress of information technology, trade liberalization and the opening of markets on all five continents. Canada Economic Development is proud to be at the centre of this new economy and to make an active contribution to the growth of Quebec enterprises and regions. As Minister of National Revenue and Secretary of State for the Economic Development Agency of Canada for the Regions of Quebec, it is my pleasure to present this *Performance Report*, which provides a true picture of the Agency's accomplishments and the efforts it is making to meet the sizeable challenges posed by the new rules of globalization.

To remain competitive in a changing world, institutions, enterprises and governments must re-invent and redefine themselves. For the Government of Canada, this means a clear desire to bring its programs and services closer to the citizens it serves, stimulate job creation and ensure the economic growth of every region of the country.

Canada Economic Development makes a concrete contribution to implementing Government of Canada's new priorities. In 1999-2000, the Agency, in co-operation with local Chambers of Commerce, established 19 new points of service for enterprises in Quebec, providing them with improved access to the information that is crucial for their development and, especially, their growth.

In addition, through strategic local and regional partnerships, the Agency has been able to create a solid multi-disciplinary business network that can provide significant support for Quebec organizations and enterprises. Areas of activity vary from the startup of new enterprises to export marketing, as well as technological innovation. Over the past year, the financial assistance granted by the Agency and its partners to a variety of projects has allowed for the creation of 6,263 jobs and the maintenance of another 6,105. These job results come from a number of sources, including the Agency and its partners and intermediaries follow-up activities, an annual survey and various evaluations conducted by outside firms.

If job creation is the motor for economic growth, the creation of *sustainable* jobs is becoming synonymous with security and prosperity. Canada Economic Development puts an emphasis on the sustainable effect of its programs and activities. A survey in March 2000, targeting a sample of Agency clients from 1996-1997, indicated that the vast majority of jobs created continue to exist three years later. What is more, an average of 2.5 additional jobs have been added by supported projects.

These results clearly illustrate the importance assigned by the Agency to the accomplishment of its mandate.

I am very proud of these particular initiatives, which testify to our commitment to ensuring the growth of enterprises and the economic development of the regions of Quebec in the new context of globalization.

The Honourable Martin Cauchon
Secretary of State

PART II AGENCY PERFORMANCE

2.1 Quebec economic context

Over the past few years, economic growth in Quebec has compared favourably to the average for the 29 OECD member countries, but lags slightly behind that of the Canadian economy as a whole. Weak private investment for several decades has had an impact on the ability of enterprises to increase productivity. The employment rate has improved and the unemployment rate in Quebec has been falling since the mid-1990s. However, the gap between Quebec figures and the national average for these two indicators has remained practically unchanged.

Nevertheless, Quebec's economy is currently making the transition to a new era, characterized by market globalization and the emergence of a knowledge-based economy, with knowledge and skills as the main factors of competitiveness. Quebec has experienced major growth in recent years in high technology sectors related to the knowledge economy. Quebec has a high quality, specialized labour force, but a shortage is beginning to loom, especially in some high-tech sectors. The knowledge economy and high technology sectors require sustained efforts in terms of research and development (R&D). Growth in R&D spending has been strong in Quebec in recent years. The number of enterprises active in R&D has more than doubled in a decade. The share of SMEs in overall R&D spending in Quebec increased from 8% to 13.4% in just a few years. With 2.1% of its Gross Domestic Product (GDP) devoted to this type of spending, Quebec has, for ten years now, ranked first among the Canadian provinces (average of 1.6% in 1997) in this regard. However, its R&D/GDP ratio trails that of the most important industrialized countries.

The adoption of advanced technology is another area where there has been considerable progress in the province. Nevertheless, Quebec is still behind other Canadian provinces, especially with regard to the adoption of new information and communications technology.

There has been sustained growth in Quebec's foreign trade in recent years, similar to that of the national average. The United States is Quebec's main trading partner, accounting for more than half of exports and nearly one-third of imports, while Ontario, accounting for one-fifth of sales and one quarter of Quebec purchases, ranks second as a client and supplier.

The Quebec economy is characterized by a higher proportion of SMEs than anywhere else in Canada or the United States. SMEs are, on average, less innovative, productive and involved in exporting than larger businesses. Traditional sectors are an important part of Quebec's industrial structure. Enterprises in these sectors are generally less involved in innovation and export marketing than highly technological firms.

In regional terms, Quebec's transition to a knowledge economy is affecting the position of regions on the world economic scene. Open to the world, the Greater Montreal region is a hub of national and international interaction, a relay station for the flow of goods, services, people, capital and information. Almost 60% of Quebec jobs are located in the Montreal region and its periphery (Laval, Laurentians, Lanaudière and Montérégie). This share increases to 71% for jobs in knowledge-intensive industries. Greater Montreal has improved its economic performance in the past few years. The region is carving out an enviable place in many advanced sectors, including aeronautics, telecommunications, pharmaceuticals, information technology, biotechnology and the health industry. It can build on a critical mass of industrial R&D and many well-known research centres and universities. Montreal is an active competitor of the world's metropolises network. The region built competitive advantages in recent decades meaning that it now excels in the manufacturing and assembly of high technology products and makes an impressive showing in knowledge-intensive services.

Owing to their universities and research centres, the metropolitan Quebec City region and the Quebec part of the Ottawa-Hull metropolitan area have, to a lesser extent, also become part of some new economy niches, especially laser optics and New Information and Communication Technologies (NICTs).

The Sherbrooke, Trois Rivières and Chicoutimi-Jonquière metropolitan areas and the Rimouski and Rouyn-Noranda clusters are increasingly capitalizing on their universities to participate in the knowledge economy, developing expertise in scientific and technical know-how in fields where there is an advantage. The Centre-du-Québec and Chaudière-Appalaches urban regions, especially the Drummondville and Beauce areas, are building on a dynamic manufacturing sector.

The economic areas outside urban centres are primarily based on the exploitation of natural resources. These regions are broad and not densely populated, and are greatly affected by economic cycles and other exogenous factors related to international conditions. Demographic growth is weak, even negative in some cases, with a substantial exodus of young people to university towns. Therefore, the ageing of the population is even more pronounced in these areas than in the rest of Quebec. The Gaspé/Magdalen Islands region is facing an especially difficult situation, where not only some major enterprises have closed down, but the stock of Atlantic groundfish has also dramatically declined.

In summary, over the next few years, all Quebec regions and enterprises will be called upon to make the most of development opportunities related to the new economy and create new, knowledge-based competitive advantages. The adjustment challenges will be even greater for outlying regions affected by specific cyclical and structural issues.

2.2 Performance expectations

Canada Economic Development's performance expectations for 1999-2000 are presented in the 1999-2000 Report on Plans and Priorities and reflect the changes in the economic development issue in Quebec. The objectives follow and directly contribute to the accomplishment of the Government of Canada's main economic priorities especially in the areas of: economic development of Quebec's regions, communities and rural areas; economic revitalization of areas where the economy is profoundly disrupted; and by encouraging entrepreneurship amongst youth, Aboriginals and other target groups.

Reflecting the spirit of Canadian solidarity, one of our country's basic values, Canada Economic Development makes a special contribution to the constitutional commitment to promote equal opportunity for all Canadians seeking well-being, to foster the economic development of every region, and to seize the development of opportunities presented by the new economy. The Government of Canada also wants to be closer to its citizens. In Quebec, the Agency contributes to this objective through its 13 business offices and its network of intermediaries and local and regional partners.

The Agency promotes the economic development of the regions of Quebec. This objective is attained through several types of activities, including contributions to intermediaries and partners for the delivery of their services. A wide range of results are expected from these activities. The Agency's main results are: access to information for entrepreneurs, entrepreneurship awareness, making enterprises aware of innovation and export marketing and the adjustment of small- and medium-sized enterprises (SMEs) to new market globalization, innovation and R&D trends. The results are indicated by economic growth, job creation, realization of Canada's full potential on international markets in terms of both exports and investment, an increase in innovation and knowledge, the growth of SMEs and the positioning of Canada as the most connected country in the world. The Agency's *Chart of Key Results Commitments* for 1999-2000 is shown on the next page, and indicates attainment of the main objectives, as stipulated in the 1999-2000 Report on Plans and Priorities.

*Canada Economic Development for Quebec Regions
is mandated to promote the economic development of the regions of Quebec*

To provide Canadians with support for:	To be demonstrated by:	Achievement of main objectives
The growth of Quebec's SMEs	Access to Government of Canada information and services	▲
	Stimulation of entrepreneurship, especially among young people and Aboriginals, and improvement of the business climate	●
	Innovation, the adoption of new technology, production processes or organization methods	●
	Export marketing, the development of new markets and access to government contracts	△
Increased economic development capability in the the regions of Quebec	Improve the technological capability in the regions	▲
	Enhance ability to attract international tourists	▲
	Lead to the creation of a climate favourable to projects involving international partners	▲
	Facilitate adjustments of regions and communities to the new globalization context	▲
Economic development of local communities in Quebec	The creation of local development initiatives	▲
	The startup and expansion of small local enterprises	▲
Adjustment of disrupted regional economies in Quebec	The economic development and adjustment of Quebec fishing communities	★

Legend: ★ Objective exceeded ● Objective attained ▲ Partially attained △ Progress made

2.3 Performance achievements

2.3.1 Presentation of Financial Information for 1999-2000

<i>Canada Economic Development for Quebec Regions</i>	
Planned spending ¹	336,366,249
Total authorities ²	299,215,608
Actuals in 1999-2000 ³	257,994,115

Introduction

Regional economic development is a highly complex issue and calls for both ad hoc intervention and more long-term activity to deal with a changing economic situation. The Agency has invested in a variety of initiatives, both in the past and during 1999-2000, leading to the short- and medium-term results shown in this report. The Agency uses a combination of performance measurement tools to determine the significant results of these types of activities. The tools used, primarily an Annual Survey and project monitoring activities, underestimate the impact and long-term effect from these activities. A specific survey on the sustainable effect of the activities brings this underestimation into evidence since it indicates not only that jobs created through projects receiving Agency assistance have been maintained, but that others have subsequently been created (see section 2.3.3 Measurement of Long-Term Impact).

To simplify this document, only certain results have been selected, which are characteristic of the Agency's main programs and activities. The report also contains examples of the results of specific projects and translated testimony from clients as to the effect and impact of Agency activities. The results are presented on the basis of key indicators for each Agency program and activity and in the same order as they appear in *The Chart of Key Commitments*.

Lastly, the Agency also reports the results obtained by the delivery of services to its clientele by its intermediaries and partners, especially the Community Futures Development Corporations (CFDCs), the Groupement des chefs d'entreprise du Québec,

1 Forecast expenditures based on information known at the time the Report on Plans and Priorities was prepared (planned spending).

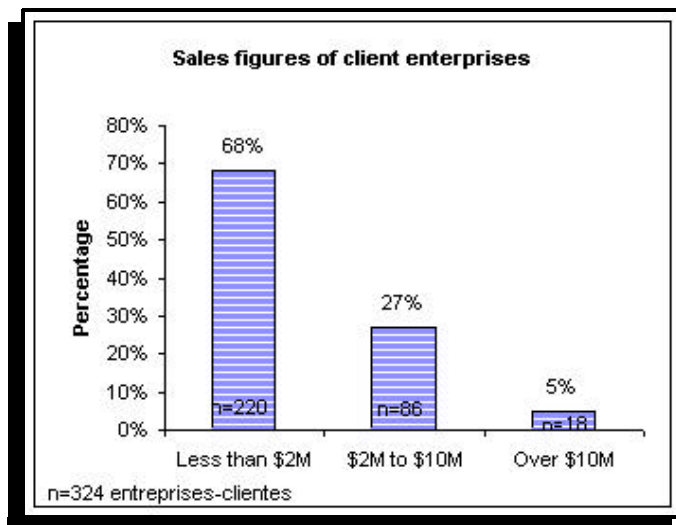
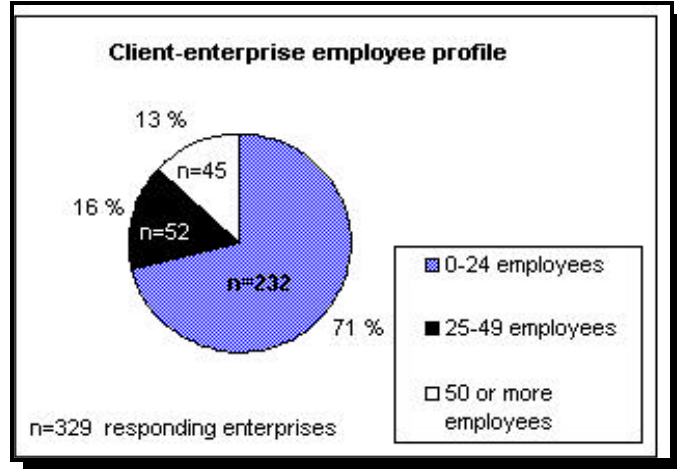
2 The main and supplementary expenditures approved by Parliament to enable departments to adjust to new priorities and unforeseen events (total authorities).

3 What was actually spent (actual expenditures in 1999-2000).

the Quebec Chamber of Commerce, export promotion corporations (ORPEX) and many others. Appendix II contains the complete list of these organizations.

Profile of Agency client enterprises

Agency activities are mainly focussed on small- and medium-sized enterprises (SMEs) in the regions of Quebec. A statistical analysis of a sample of our projects and activities show that most of the enterprises supported by the Agency in 1999-2000 had a sales figure of under \$2M and fewer than 24 employees.



The analysis also revealed that 62% of the Agency’s SME clients were in the manufacturing or processing sector, 34% were in the services sector and 4% were in the natural resources sector. The graphs on this page provide further details on the profile of the enterprises the Agency has dealt with over the past year.

2.3.2 Agency activities' Performance

2.3.2.1 The growth of small- and medium-sized enterprises in every region of Quebec

The Agency promotes access to information for existing and future entrepreneurs in order to encourage entrepreneurship, to help them make the most of business opportunities and to assist them to adjust to the new market globalization context. To better meet the needs of its clients in a quick and cost-effective way, the Agency has established an effective network of intermediaries and partners. As a result, a number of conferences have been organized to enable Quebec enterprises to extend their network of contacts and share their experiences with foreign economic stakeholders. In addition, SMEs are made aware of the importance of innovation and receive guidance during their process to innovate. Through its extended network, the Agency encourages export marketing through export preparation programs

Testimony from entrepreneurs (translation)

“Very good source of information that we contact whenever we need to, without hesitation.”

“Information and advisory services are very accessible and easy to understand.”

“I was surprised by the quality of the attention I received and their level of understanding of the problem.”

(Source: Annual Survey)

Access to information and Government of Canada services

Small- and medium-sized enterprises can only grow if they are able to access relevant information in a timely manner. However, this access must be continuously improving in order to provide existing and future entrepreneurs with the particularities of the programs and services intended for them. This kind of information is delivered through the Agency's programs and those of its intermediaries and partners.

The Agency and its business network responded to almost 115,000 requests for business-related information. To encourage access to information for SMEs, the Agency, in co-operation with local Chambers of Commerce facilitated the expansion of 19 new Canada Business Service Centres Network (CBSC) in 1999-2000. Canada Economic Development invests in CBSCs that provide service points for enterprises in Quebec and a complete front-line business information service. There are now a total of 33 service points in Quebec.

As an example, the Montreal CBSC (known as Info entrepreneurs) responded to some 90,000 requests in 1999-2000, most of them by telephone or via their Internet site. This organization is a result of a partnership between the Agency, the Board of Trade of Greater Montreal and the Government of Quebec. The Quebec City CBSC (known as Ressources entreprises) responded to 19,000 requests and 488 specialized activities were carried out in 1999-2000.

The number of visits to the CBSC Internet site, including the use of such tools as the Interactive Business Planner, increased from 8,000 visits to more than 18,000 in 1999-2000 (http://pegasus.cbsc.org:4000/sbc-doc/home_en.html).

A CROP survey of the Montreal CBSC, Info entrepreneurs, indicated that the rate of user's satisfaction rate was very high with regard to the accessibility, the quality of telephone contacts and the information obtained (86% of Info entrepreneurs clients would recommend this service to friends or colleagues without hesitation).

In addition, the Agency has been working to lay the foundations for a CBSC specifically for Aboriginal SMEs in Quebec, so as to increase economic opportunities for the people of the First Nations. The Aboriginal CBSC will be established in the fall of 2000, with the First Nations Business Association.

In 1999-2000, the Agency provided over 1,200 information related services for enterprises, including 303 instances of information and advice for SMEs (ex: list of potential buyers, economic profile of a region, etc.) and responded to 67 requests for more strategic information (ex: documentation on preparing for the transition to the year 2000, etc). Traffic on the Agency's Internet site in 1999-2000 was in the order of 70,000 visitors and about 100 requests for information on the Agency's programs were made over the Internet.

Information and advice are also provided by the Community Futures Development Corporations (CFDCs). These are discussed in "The Economic Development of Local Communities in Quebec" section of this document.

In addition, the Agency organized three Conferences/Info-Fairs for SMEs in various parts of Quebec in 1999-2000. Over 1,500 visitors obtained information and became familiar with federal assistance programs and services to SMEs. In 88% of cases, the Conferences/Info-Fairs met the

**Testimony from entrepreneurs at
Conferences/Info-Fairs (translation)**

"[...] in my opinion, this is the first place to come to get started in business."

"It is an excellent idea to bring services together in a single location [...]"

Source: Evaluation Sheets

expectations of visitors, who said they were satisfied with the information obtained, the explanations of the advisors as well as the documents received.

Lastly, the Agency contributes to the development and dissemination of knowledge on economic development issues, in order to accumulate and assimilate information on the latest trends and make them part of its ways of doing things so as to serve its clients better. In this regard, a strategic watch service, the Observatory, established in 1998, conducts research that deals mainly with themes critical to transition to the economy faced by Quebec economic transactors and regions. Such themes as innovation, factors in the growth of enterprises, globalization and metropolization are studied and monitored by the Observatory. By organizing and participating in almost 20 events (seminars, symposia and conferences), the Observatory has been able to reach almost 500 development stakeholders, mainly in Quebec. In 1999-2000, the Observatory published six research reports, three information bulletins and 18 fact sheets illustrating best practices with regard to innovation and the information society. A discussion paper, *Taking Action on Development*, consolidates several of these research projects (<http://www.dec-ced.gc.ca/en/obs-plan.htm>).

Stimulation of entrepreneurship, especially among youth and Aboriginals, and improvement of the business climate

To encourage the emergence of an entrepreneurial spirit, the Agency supports a number of awareness, enhancement and joint-action initiatives throughout Quebec, some of which are aimed more specifically to reach such target groups as youth and Aboriginals.

According to surveys conducted, the televised series “Fais-en ton affaire”, intended to stimulate, enhance and promote entrepreneurship, has reached 200,000 viewers a week who are interested in entrepreneurial issues (26 30-minute shows). This televised program was developed by the MacLean-Hunter Entrepreneurship Chair of the École des Hautes Études Commerciales (HEC), in partnership with the Agency. It provided the public information on government programs and services for entrepreneurs. The program’s virtual cyber-mentoring network (where youth receive free advice from experienced entrepreneurs)

**Testimony from clients of the Groupement
des chefs d’entreprise du Québec
(translation)**

“I would like to mention the efforts with regard to networking and linking; this is a wonderful service.”

“It’s a remarkable organization (Groupement des chefs d’entreprises), extremely useful. It helps us not to feel isolated.”

(Source: Annual Survey)

was a resounding success, with over 135,000 visits from October 1999 to April 2000. The program won the 1999 Mercuriades award in the self-employment offer category and was nominated for four Geminis in the best service program and best research categories.

Another organization that benefits from the Agency's assistance is the Groupement des chefs d'entreprise du Québec. This association's mission is to bring together entrepreneurs and provide them with a forum where they can mutually assist each other by sharing their experiences. The Groupement provides members and non-members with counselling and strategic services (739 this year) and has enabled 170 enterprises to receive a diagnostic service through the University of Quebec at Trois Rivières. A survey of the Groupement's clientele confirmed the high level of satisfaction with the organization in terms of the professionalism of its staff and the quality of the services received.

Success Story

The Fondation du Maire de Montréal pour la jeunesse provides financial assistance for young entrepreneurs, offering support for the planning and startup stages and providing follow-up. Canada Economic Development provided a grant of \$555,025 to the Fondation to support the organization's activities and maintain the awards program. Since its creation in 1995, the Fondation has presented 164 awards, totalling \$892,925. Enterprises developed as a result of this financial assistance have led to the creation of 417 jobs.

In 1999-2000, the Agency supported more than 15 competitions and awards to promote entrepreneurship in the regions of Quebec, including the Fondation du Maire de Montréal, described on the right. A number of galas were organized province-wide to honour entrepreneurial initiatives by youths and Aboriginals, for example.

To make it easier for young entrepreneurs to access funding, the Youth Strategy, one of the components of a program managed in partnership with the Community Futures Development Corporations, has helped many

enterprises startup plans become a reality. In 1999-2000, 231 projects were supported throughout Quebec, for a total contribution of \$2.2M, generating investment in the order of \$15M and the creation and safeguarding of over 780 jobs. This initiative is intended in part to counter the exodus of young people from rural areas.

In 1999-2000, the 53 student entrepreneur clubs receiving financial support from the Agency has raised the awareness of 900 young people about entrepreneurship and how to run a business, promoting the startup of 15 new enterprises. For example, the Centre d'entrepreneurship HEC-Poly-UdeM, mandated to create an interest in business among university students, received over 50 applications for its "De l'idée au projet" competition and presented awards totalling \$100,000 to 25 recipients. Following this competition, six new enterprises were started up, creating 47 jobs. The Agency also worked with economic development organizations, school boards, colleges and universities to organize the first national educational network entrepreneurship competition, promoting

entrepreneurship among young people. Over 2,500 applications were received and 588 business projects started up.

In terms of initiatives aimed more specifically at Aboriginal people, the Agency provided financial support for a variety of projects in 1999-2000. Agency financial assistance contributed to the creation of a business incubator by the Wolinak Abenaki Band council, where four enterprises have already set up business. In addition, an Innu economic summit was organized in Sept Iles in 1999-2000 by the Uashat and Maliotenam Economic Development Corporation. The summit brought together almost 200 stakeholders from the Innu and Naskapie communities and helped create a profile of the present situation as well as a list of the existing economic opportunities.

Through the Agency's support a contribution of \$190,000 helped the Cree community CFDC (Eeyou Economic Group) to make 11 projects for youth a reality in 1999-2000, leading to the creation of 36 jobs. Twelve other business projects supported by this CFDC created 27 jobs and safeguarded another 26.

In 1999-2000, the Agency worked to create an environment favourable to the creation and expansion of Aboriginal enterprises. In concrete terms, this involved the establishment of an information centre for Aboriginal entrepreneurs, access to export services and support for the management of an off-reserve venture capital fund. All these new initiatives will become operational in 2000-2001.

The Agency contributed to a number of community mobilization, awareness and economic leadership initiatives. For example, with the Agency's assistance, "Femmes en affaires du Rouyn-Noranda régional inc." strengthened its support network by providing seminars on issues of concern to its members. In the Montérégie, an exchange network between SMEs and research centres (Valotech inc.) brought together about 10 enterprises, 58 entrepreneurs and 12 researchers, resulting in five technology transfer proposals. All this, only after two months of existence.

Innovation, the adoption of new technology, production process or organizational methods

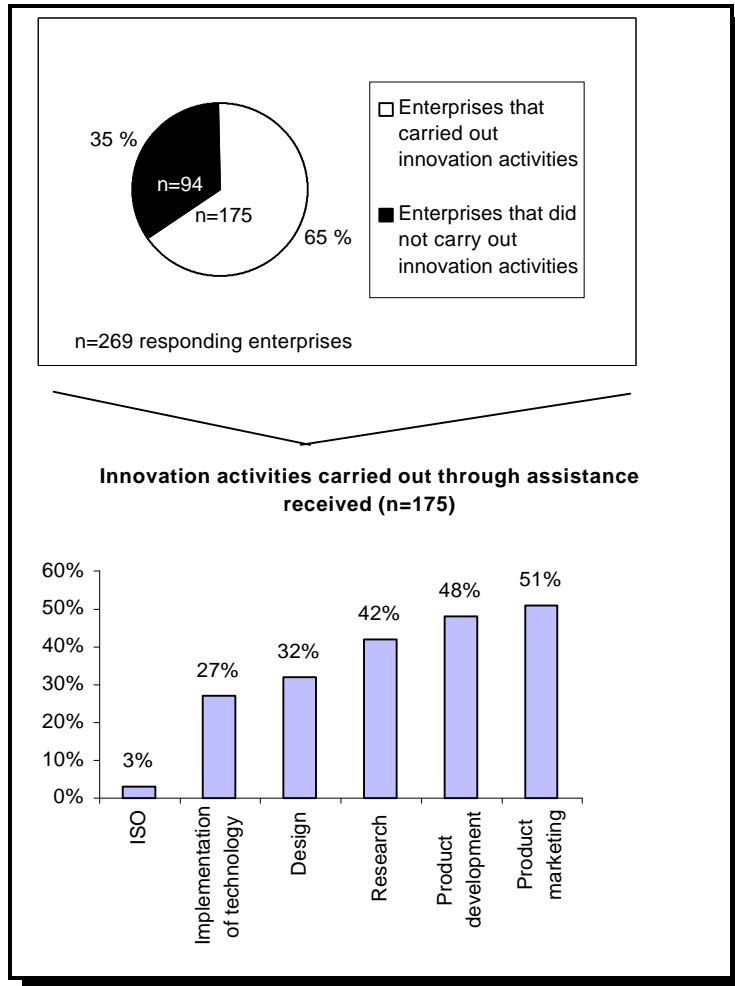
In order to strengthen the competitiveness of SMEs, the Agency provides financial support for a variety of activities involving technological developments and the promotion of the innovation marketing.

A survey of a sample of the Agency's clientele indicated that the majority (65%) of firms receiving Agency assistance (all programs combined, with the exception of the Regional Strategic Initiatives Program) carried out innovation activities after receiving this assistance (see table on next page).

In 1999-2000, the Agency, with the help of its network of intermediaries and partners, supported over 360 enterprises in their technological initiatives, including over 120 projects under the IDEA-SME Program. The main results of the range of technological initiatives carried out over the course of the year are presented here, including some testimony and three examples of innovative enterprises (see following boxes).

In 1999-2000, the Agency contributed to the startup of 89 technology firms through eight technology incubators in most regions of Quebec (see list of organizations in Appendix III). The Agency nearly tripled its yearly objective of assisting about 30 enterprises via this activity.

These enterprises have so far created almost 250 jobs. The new technological firms have strong potential for generating sustainable jobs. For example, two enterprises that are recent “graduates” from a technology incubator have created 125 specialized jobs and generated revenue of about \$30M, a large share of it from exports. In 1999-2000, the Agency held over 100 consultation sessions with the educational and business communities, in order to define its electronic commerce



Testimony from clients (translation)

“The Agency is a major development organization, essential for corporations that want to innovate or export.”

“Canada Economic Development’s involvement was swift and came at a critical juncture in our development. It was a determining factor for us.”

“It is essential for the Agency to support new enterprises in new sectors of activity and new technology.”

(Source: Annual Survey)

approach. The Agency's electronic commerce strategy, launched in 1999-2000, is intended to speed up the development and use of electronic commerce by Quebec SMEs by having educational institutions, associations and other groups become involved in promoting the use of electronic commerce in enterprises.

Information and awareness activities regarding issues and advantages of electronic reached over 10,600 enterprises. Over 4,000 of them received counselling services from the Electronic Commerce Institute and the 5,000 members of the Quebec Network of Chambers of Commerce can now be served electronically. Both these organizations are supported by the Agency. In another context, a study funded by the Agency resulted in the creation of an Internet portal, Netmétal.com, by the Centre francophone d'informatisation des organisations (CEFRIO), virtually linking about 20 SMEs in the metal products sector. Lastly, a project to create an electronic commerce laboratory, Technologies Polydev, enabled sub-contracting SMEs to take the first steps in connecting to the extranets of major contract providers, mainly in the aerospace, transport and electrical and electronic products sectors.

Success Story

RSW-Béroma operates in the mining sector in Val D'Or. The firm has developed an operational and marketable prototype of a modular plant for the processing of gold ore. This is a Canadian first for the small scale exploitation of gold deposits in line with a sustainable development strategy. Canada Economic Development and the National Research Council of Canada provided repayable financial assistance for the pre-marketing phase for the product. The success of this project opens the door for the development of small, rich deposits which were not exploited in the past but could now be of interest to major mining companies.

In 1999-2000, the Agency continued its financial support for the Operation SME program, in partnership with the Ordre des ingénieurs du Québec (OIQ) and the Greater Montreal Innovatech Corporation. The program is intended to provide financial assistance to SMEs in order to encourage them in hiring human resources with technological skills, in this case engineers. The program helps to increase innovation capability and improve productivity in SMEs through technological development. The objective for 1999-2000 was to place about 100 engineers in Quebec SMEs. The program allowed for the hiring of 90 engineers in remote

regions over the year. In these regions, engineers are particularly rare in SMEs and it remains difficult to recruit qualified employees. The Operation SME program helped increase the number of engineers in Quebec SMEs by 50% since 1993.

In order to facilitate access to capital for SMEs with few tangible assets to offer as security as well as to encourage financial institutions to take on greater risks and to develop expertise in high technology sectors, the Agency signed partnership agreements between 1995 and 1997 with five financial institutions (Canada Business Development Bank, Royal Bank, National Bank, Bank of Montreal and Confédération des caisses populaires Desjardins). The agreements encouraged the provision of term loans of \$100,000 to \$500,000 for projects to market new products, processes, and technologies and to develop new export markets in high technology sectors. In 1999-2000, 14 loans were approved for a total value of \$4.7M and investment in the order of \$27M. Since the signing of the agreements, 129 loans have been approved for a total value of \$38.1M and investment of over \$100M.

Success Story

With the assistance of Canada Economic Development, MG Services, a firm in l'Assomption, developed and marketed an electrification system for ice resurfacers. This concept has a threefold advantage: the transition from combustion traction to electric traction results in much better performance; existing resurfacers can be recycled; and the system is cost-effective and non-polluting. Canada Economic Development provided MG Services with repayable financial assistance of \$166,210. The firm maintains most resurfacers in Quebec and plans to expand its electrification concept to the rest of Canada and the United States.

In 1999-2000, the Agency helped to create two new research centres with business links with SMEs that will focus on technology transfer. First, the technology platform of the research centre at the University of Montreal Hospital Centre (CRCHUM) was created, promoting co-operation between the hospital-university sector and private enterprise. The Agency's assistance allowed for the construction of a gene therapy clinic, a molecular diagnostic laboratory, an infrastructure of technology transfer of research assistance and a conference room. The Agency and the Government of Quebec then provided support for creation of the software testing centre at the Centre de recherche informatique de Montréal (CRIM). This initiative, unique in Canada, provides a high quality independent software compatibility service.

The Agency contributes to the development and promotion of design (industrial, graphic, fashion and architectural) by funding a variety of activities at the Montreal Institute of Design (IDM). A digital imaging research laboratory was set up at the University of Quebec at Montreal and a virtual network linking various Quebec associations was established. Nearly 4,000 people participated in IDM conferences and a number of Quebec designers were able to benefit in terms of either visibility or promotion at exhibitions abroad.

In addition, the Agency invested in the Quebec National Optics Institute, allowing for a research program in the fields of optics and photonics and the creation of a mini-production laboratory and generating more than 175 new jobs

Still in terms of technological development, the Agency contributed to the startup of 20 new media enterprises in the Montreal region in 1999-2000 through the testing fund of the Centre d'expertise et de services en applications multimédias (CESAM). Sales by these enterprises totalled almost \$4M.

In the Quebec City region, the “Technoregion Fund” initiative, with a budget of \$10M over five years, supported the startup of new technology SMEs and those using advanced technology in order to create a critical mass, enabling the region to accomplish its objective of becoming a true technoregion. The initiative results from a partnership with the Gatiq Technorégion corporation. The initiative was received with great enthusiasm since there was a clear lack of financing on the market. Two projects were undertaken through this initiative in 1999-2000 and creating \$2M worth of his investments.

The Agency is also an active member of the Canadian Technology Network (CTN), initiated by the National Research Council (NRC), which brings together several federal departments. This Canada-wide network of specialized advisors in a variety of technology sectors linked electronically, helps support the innovation projects of SMEs through a structured system that enables them to access information quickly. Almost 700 applicant innovators across Canada were able to benefit from rapid networking contact with specialized resources, an increase of 38% over last year.

Export marketing, the development of new markets and access to government contracts

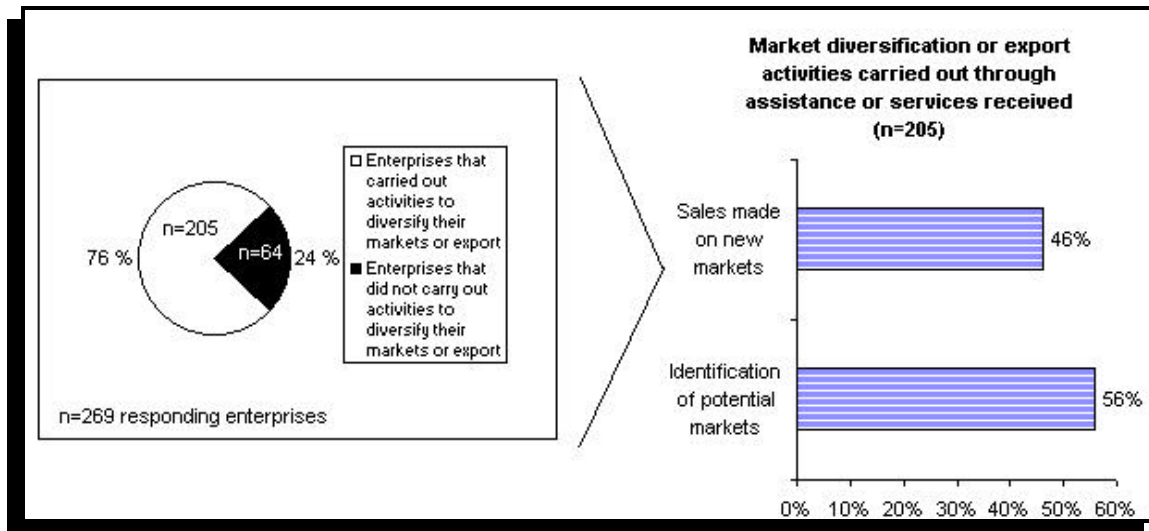
Agency activities in this regard are intended to encourage enterprises to become more involved in developing export markets by reducing risk through cost-sharing and export marketing activities. The Agency, directly or through intermediaries or partners to which it gives financial support, provides awareness and preparation activities for enterprises in this area.

Success Story

Audiosoft, of Boucherville, is marketing a new type of technical assistance that facilitates learning by people with hearing disabilities. The AUDISEE technique uses a system of mini-cameras that transmits the face of the speaker onto a monitor, thus enabling the hearing impaired to listen to nearly the entire speech in real time. This technique makes it easier for the hearing disabled to integrate into the classroom. Audiosoft received a repayable financial assistance of \$170,698, which was used for R&D for the product and the development of a marketing plan.

Audiosoft won the 1999 Canada Grand Prize - Progress and Technological Innovation

In 1999-2000, the Agency and its partners supported 419 export market development projects reaching over 4,370 entrepreneurs. From these, the Agency directly supported 253 projects under the IDEA-SME Program and the Program for Export market Development (PEMD). PEMD is a program of the Department of Foreign Affairs and International Development (DFAIT), but is administered by the Agency in the regions of Quebec.



The table above shows the high proportion of our clients (all programs combined, except the Regional Strategic Initiatives Program) that carried out export and market development activities. A survey of a client sample indicates that 76% carried out market diversification or export marketing activities after receiving Agency assistance. Of these firms, 46% made sales on new markets and 56% identified potential markets.

With the Agency assistance, a number of specialized organizations guide enterprises through the stages in their apprenticeship. In 1999-2000, the 18 regional export promotion organizations (ORPEX) funded by the Agency, carried out several types of activities for SMEs, most of which (70%) had very little exporting experience. More than 35 export awareness activities reached 1,200 entrepreneurs. Sessions for the development of export-related competencies enabled 1,660 entrepreneurs to learn about the subject. Ten sessions for new professional exporters (NEXPRO) brought together nearly 200 people. About 300 enterprises received individual guidance in the export process and more than 500 enterprises received assistance in penetrating markets (49 trade missions).

The Montreal World Trade Centre (WTC), the only ORPEX offering province-wide activities, provides SMEs at the novice, intermediate and advanced stage of market development, with structured export preparation services that adequately responds to their needs. The organization is at the centre of an international network of similar organizations in 350 cities and over 100 countries. In 1999-2000, about 1,100 people participated in 43 workshops on export-related themes. The WTC provides trade mission services tailored to the needs of specific industrial sectors through its vast network of business relations abroad. In 1999-2000, the WTC organized 16 New Exporters to Border States (NEBS) missions with international funding institutions and a specialized mission for the mass transit sector. Over the past year, over 240 SMEs have participated in trade missions organized by the WTC.

Client Testimony (translation)

“It is [...] critical for the development of exporting enterprises in my region.”

“It is very handy to know that there are resource people (Orpex) for SMEs.”

(Source: Annual Survey)

An example of an ORPEX which provides services locally, is Estrie Internationale 2007 inc.. It guides enterprises through the export marketing process (diagnoses, export plans, market evaluations, exploratory missions, etc.). It has helped increase the exporting enterprises ratio in the Eastern Townships from 25% to 35.2% since 1996.

A survey of ORPEX clientele indicates a high rate of satisfaction with regard to the professionalism of the staff and the quality of services. It should, nevertheless, be emphasized that over 89% of clients were able to reduce the risks associated with their projects through the assistance provided by these organizations and that over 97% of clients felt that access to such services met an essential need in their regions.

Success Story

Copernic.com, an enterprise in Sainte-Foy, has designed a meta-search software program that enables Internet users to search through several dozen databases on the Internet. This search engine currently has 6,600,000 users and is adding 500,000 new users every month. It is the most popular and renowned meta-search software in the world. The firm has also successfully marketed a commerce software package known as Copernic Shopper, which facilitates electronic commerce (shopping robots). Financial assistance of \$100,000 from the Agency has enabled the firm to penetrate the US market.

In another area critical to market development, the Agency supports the “Association des manufacturiers des produits alimentaires du Québec” through a program which aims to increase the competitiveness of enterprises in both foreign and domestic markets, by consolidating the standard requirements that ensure food safety. The program has

reduced costs related to the discarding of sub-standard products, and has facilitated international trade, especially with the United States, where the standard is mandatory.

In addition, the Agency helped, through the Centre de promotion du logiciel québécois (CPLQ), who supports Quebec software producers, developing contacts and partnerships to market their products both locally and internationally. Nearly 1,000 companies took part in CPLQ activities in 1999-2000.

Some Agency partners are specifically mandated to help Quebec SMEs participate in Government of Canada publicly advertised tender calls for the purchase of goods and services. For example, the Centre de développement des entreprises technologiques Antenna Project provides a government contract watch and referral service that enabled about 100 SMEs to increase the value of their contracts by about \$8.8M in 1999-2000.

Lastly, still from the standpoint of support for future exporters, the Agency, together with Industry Canada, has developed export diagnostic tools for the information technology and new media sector. The tools will be available over the Internet in 2000-2001. Another project is also being developed with the Association de la construction du Québec to provide a range of services for trade mission programs adapted to the construction sector.

2.3.2.2 The growth of the economic development capabilities of the regions of Quebec

The Agency, in co-operation with community stakeholders, has continued to implement the Regional Strategic Initiatives (RSI) Program, intended to create a long-term impact on the structure of regional economies, and foster a business climate favourable to the development and competitiveness of SMEs in the Quebec regions. Strategies for the non-metropolitan areas of Laurentides and Lanaudière region, the Abitibi-Témiscamingue region, the Sherbrooke region and the Trois-Rivières region were added (in 1999-2000) to the existing regional strategies (Nord-du-Québec, Bas-Saint-Laurent/Gaspésie/Îles-de-la-Madeleine, Québec/Chaudières-Appalaches, Saguenay/Lac-Saint-Jean regions and the Action Strategy for Greater Montreal). The Agency plans to establish regional strategies for all Quebec regions. RSI strategies involve four areas of activity: development of the technological capability of the regions, tourism development, support for the drawing power and international reach of the regions as well as the regions's capabilities to adjust. Several examples of accomplishments in each area of the program are presented here.

In 1999-2000, 145 projects were financed under the various regional strategies, 30% of them related to technological development, 25% to tourism development, 19% to international reach and development of the regions and 26% to the regions's ability to adjust. Most projects (69%) involved partnerships with non-profit organizations.

Federal contributions have a financial leverage effect on all participating partners. For example, in 1999-2000, the Agency invested in 36 projects under the Action Strategy for Greater Montreal. The Agency's contribution was \$42.3M, and it generated \$124.4M.worth of investments.

Improve the technological capability of the regions

This area of activity under the RSI Program is intended to increase the ability of SMEs in the regions to use technology and innovation.

In 1999-2000, the Saguenay—Lac-Saint-Jean RSI enabled two projects to be carried out by secondary processing firms—one in aluminum and one in wood—allowing for the creation of 12 jobs and the maintenance of 19 other. In addition, a research consortium to which the Agency lent its support, resulted in four technology transfers in the forestry industry (see box): preparation of a tool for predicting forest regeneration after a fire (gain of five years growth, compared to earlier knowledge), design of a tool for predicting forest regeneratin after cutting (20% reduction in inventory work), a procedure for planting black spruce using advantitious roots (gain of five years in speeding up maturity) and a method for identifying the yellow spruce (increase in product quality and value).

Under the “Marine technopole” component of the RSI in the Bas-Saint-Laurent and Gaspésie-Îles-de-la-Madeleine region, regional teaching institutions carried out eight transfers of technology to SMEs in the field of aquaculture and enhancement of emerging marine species.

Enhance ability to attract international tourists

Most RSI strategies include a tourism component, aimed to enhance a region’s ability to attract international tourists, by fostering the development of tourist activities that not only can attract and retain visitors from abroad but also help to lengthen the tourist season.

The Agency contributed to the international reach and positioning of Montreal, Quebec City and many other cities as destinations by providing assistance for festivals and other major events. Based on a 1995 study by the Tourism Chair of the University of Quebec at Montreal, annual impacts of these events translates into \$215M of revenue and 5,000 person/years in employment. In addition, clients of the four largest festivals have a significant impact on the occupancy rate of local hotels. According to promoters, these four festivals attracted 3.36 million spectators in 1999, which in turn certainly created other favourable economic spinoff effects in accordance with the audience increase since 1995. In addition, the Agency assisted Internationaux du Sport de Montréal (ISM) to prospect and obtain international sports events in Montreal which would consequently generate significant economic, tourism and media spinoffs.

The Agency helped maintain Quebec’s potential for hosting international art exhibitions. While preserving the architectural heritage of Montreal, the Agency encouraged the Montreal Museum of Fine Arts to adapt one of its oldest buildings to international standards. Renovations were completed in December 1999, and two major exhibits have already been presented in these rooms, attracting nearly 100,000 visitors.

The Agency has invested in the creation of a world-class, year-round destination at Mont Tremblant, which attracts over 2,000,000 visitors annually. The initiative has created over

Success Story

The Consortium de recherche sur la forêt boréale commerciale is a non-profit organization co-ordinated by the University of Quebec at Chicoutimi. It is mandated to develop scientific knowledge of the boreal forest with regard to the black spruce, exploitation of which is the basis of the Quebec forestry industry. Seven enterprises in the field worked on this project, together with three government partners and Canada Economic Development, who contributed \$875,000. The contribution went towards a variety of research activities, including one which led to the discovery of the exploitation potential of a one-million hectare area of forest that was previously classed as unproductive in the Saguenay/ Lac-Saint-Jean and Chibougamau Chapais region.

2,000 permanent jobs on the site over the past ten years and has contributed to the startup of some 80 businesses.

An evaluation of the international promotion initiatives of regional tourism associations also portrays a positive picture. Most participating enterprises report an increase in the number of visitors and tourism supply in their respective regions. However, we have learned that there is a need to continue creating tourism products based on the natural complementarity of the different regions, rather than breaking down strategies on the basis of geographic regions.

Quebec Maritime is a consortium of five regional tourism associations in the Bas-Saint-Laurent, Gaspésie, Îles-de-la-Madeleine, Duplessis and Manicouagan regions. The organization has 174 member enterprises who provide visitors with a tourism product. According to a survey of 125 of these firms, 58% of respondents indicated increased revenues, 49% have hired more employees, 48% have noted longer stays by tourists and 58% have seen an increase in the number of foreign tourists over the past three years. In 1999-2000, the organization held awareness sessions for 259 tour wholesalers from France and Italy and 79 tourism journalists from Germany, Spain, France, Italy, Japan, the United Kingdom and Switzerland. In addition, representatives of the organization took part in 26 international fairs in these same countries, as well as the United States and Brazil.

Lead to the creation of a climate favourable to projects involving international partners

This area is intended to create a favourable climate for projects involving international partners, increase the drawing power of a variety of international activities and support market promotion abroad.

The Agency is involved in the development of the Montreal International Quarter (MIQ), intended to attract a variety of international organizations to a prestigious site in downtown Montreal. Developed at a cost of \$60M, the project involves consolidating and redeveloping the Old Montreal business district to create a quadrangle with an international vocation. The Agency and other government partners (Government of Quebec, Association des riverains du QIM) have invested almost \$36M in the project, of which \$26M came from the Agency. The leverage effect created should generate investment of over one billion dollars over the next few years.

Facilitate adjustment of regions and communities to the new globalization context

The objective of this area is to support the regions of Quebec in their efforts to adjust to globalization. It is also intended to bring the new economy into rural areas by enhancing the resources from rural environment thus helping foster the emergence of networks that contribute to the development of regional infrastructure.

Two industrial revitalization projects of the Action Strategy for Greater Montreal (Angus Technopole and St-Hubert airport area) helped create sustainable jobs. The Agency is involved in development of the Angus Technopole so as to create jobs in the eastern part of Montreal, which suffers from high unemployment and poverty rates. So far, about ten enterprises have set up shop on the former Canadian Pacific site, creating 143 sustainable jobs. An economic development initiative for revitalization of St-Hubert airport area involved converting the former St Hubert military base into an industrial technopole. Over 700 jobs were created and 14 companies are now established in the facility.

In addition, two projects for the enhancement of natural resources in the Saguenay resulted in the creation of the first oat flake processing plant in Quebec and the establishment of another plant for the processing of broad beans. The two projects led to the creation of about 30 jobs.

A study was undertaken to identify telecommunications options for Northern Quebec. A commercially viable solution for establishing a satellite telecommunications network was found. It will soon be possible to examine the possibilities to provide government services and programs in this remote region through the Internet, including telemedicine and tele-education services for the local population.

The Rural Enterprise initiative, implemented in the Lower St. Lawrence and Gaspé regions, was intended to support the development of niche products. The project resulted in 41 new investment initiatives in 1999-2000, contributing to the creation of 17 new jobs and the maintenance of 19 others. An evaluation indicated that this initiative filled a need in terms of economic support tools for communities, that the vast majority of projects supported were technological in nature (87% of the files) and were submitted by SMEs or small non-profit organizations. The initiative fits in with a concern for the sustainable management of resources because of the nature of the promoters and the importance accorded to this aspect by the Agency and its partnering regional CFDCs, who actually deliver the service. Program clients have confirmed that they are generally satisfied with the services received. It should be noted that some projects made a significant contribution to the development of advanced technology.

Canada-Quebec Infrastructure Works Program

Started in 1994-1995 for an initial period of three years, the Infrastructure Works Program was extended by two years in 1997-1998 and improved at the same time. A number of projects had not been completed by March 31, 1999 and the Agency continued to administer the Canada-Quebec Agreement in 1999-2000 on behalf of the federal government and in co-operation with the Quebec Department of Municipal Affairs and Montreal (MAMMQ), the operating agent.

Phases I and II of the Infrastructure Works Program enabled 3,249 projects to be carried out, resulting in the creation and maintenance of some 38,000 jobs. The program's objective was ultimately exceeded, since the forecast was for the creation of 31,300 jobs.

2.3.2.3 The economic development of local communities in Quebec

In the regions of Quebec, the Agency administers the Community Futures Program (CFP), a national measure targeting communities outside major urban centres and underprivileged districts. The CFP is intended to support communities in their efforts to take charge of their own economic development. Three types of organization are supported financially by the Agency in this regard: the Community Futures Development Corporations (54 CFDCs), the Community Economic Development Corporations (16 CEDCs of which 2 agreements will be approved shortly) and the Business Development Centres (7 BDCs). The Agency also provides for the provincial CFDC association, the Network of Quebec CFDCs. The Agency invests in the operating costs and capital funds of the CFDCs, enabling them to provide funding for small businesses.

The 54 CFDCs throughout Quebec provide information and financial services for enterprises outside urban centres. In 1999-2000, the CFDCs provided information and advice to over 5,700 entrepreneurs (helping them prepare business plans, provide financial and personnel management, advice, etc.) and were involved in the development of local economic development initiatives. At the same time, over 1,400 enterprises and organizations received financial assistance from the CFDCs. The total amount allocated to enterprises and organizations by all CFDCs (Investment Fund, Local Development and the Youth Strategy) was over \$21M and generated investment of about \$119M. The activities of the CFDCs resulted in creating and maintaining about 8,850 jobs in Quebec's rural communities in 1999-2000. The client satisfaction level of CFDC is very high with regard to the quality of services provided and their response to community needs.

More specifically, the CFDCs provided about 500 loans through their investment funds in 1999-2000, totalling \$17.8M. In turn, the loans generated investments of about \$95.6M. Almost half of those benefiting from this component of the CFDC programming were startup enterprises.

In terms of local development activities, over 500 projects were supported by the CFDCs, for a contribution of over \$1M, which generated over \$8.8M investments. The great majority of the organizations receiving assistance under the local development component were local and regional in scope.

In addition, the CFDCs played a major role in community leadership through the establishment of Internet service points in local communities in Quebec under Industry Canada's Community Access Program (CAP). Over 190 projects were supported under the CAP.

Under a pilot project sponsored by the Agency, in partnership with the Network of CFDCs, Industry Canada (IC) and Human Resources Development Canada (HRDC), nine Canada Access Centres were established in CFDCs in the Amiante, Abitibi and Matawinie

regions. The Access Centres are one-stop information centres for Government of Canada services and programs.

The Community Economic Development Corporations (CEDCs) supported by the Agency, the Government of Quebec and municipalities are intended to develop disadvantaged neighbourhoods in Quebec's major urban centres (Montreal, Quebec City, Sherbrooke, Trois-Rivières, Hull-Gatineau) and more specifically, to foster business startups and pre-startups. The CEDCs provide information, support and technical services for enterprises. A number of projects have received financial support complementary to the Agency's through programs and provincial funds administered by the CEDCs. Over 8,000 entrepreneurs, promoters and SMEs used the information and support services of the 14 CEDCs supported by the Agency in 1999-2000 (see list in Appendix II). More than 200 awareness workshops were organized, involving nearly 2,000 entrepreneurs. Lastly, over 100 diagnostic analysis and 1,050 advisory service activities were carried out. For example, 97 activities in support of entrepreneurship, 17 local revitalization and leadership activities, 46 joint activity and networking activities and nine tool development and support activities were organized in the Outaouais by a CEDC in the region.

2.3.2.4 The adjustment of disrupted economies in Quebec

Under this area of activity, the Agency has, in the past, co-ordinated federal departments efforts for assisting the Saguenay during the torrential rains of 1996 and Central Quebec during the 1998 ice storm. In 1999-2000, the Agency continued to administer the Fund for Coastal Quebec (FCQ), whose objective is to help regions affected by the groundfish crisis in the Côte-Nord, Gaspésie et Îles-de-la-Madeleine administrative regions, and adjacent fishing communities involved in the restructuring of the fishing industry.

The Agency, with the assistance of the Community Futures Development Corporations of these regions, has diversified and strengthened the economies of the fishing communities by stimulating, developing and funding new niches for workers under the FCQ program.

In 1999-2000, 44 commercial activities and 27 economic development preparation activities were carried out. They helped create career opportunities for local workers, including 120 new jobs, thus exceeding yet another job creation objective.

A survey of enterprises benefitting from the program indicated that most economic development projects funded under the FCQ were devoted to innovation activities (81%) of which 54% were for the marketing of newly developed products or services (see box). This is a major accomplishment for the program, considering the challenge of adapting traditional industrial structures to the new economy.

The Annual Survey results indicated that service delivery had moved closer to its clients. To better respond to certain client concerns and to reduce delays, greater responsibility was given to the CFDCs in the areas concerned. This should improve program performance and the satisfaction of the target clientele.

Success Story

ABK-Gaspésie inc of Matane markets three value-added products created from by-products of the primary processing of Northern shrimp. The first two are protein concentrates intended mainly for the natural flavours market and used in the manufacture of convenience foods. The third is chitin, which has many industrial applications, from the treatment of drinking water to the treatment of serious burn victims, and including the production of coating film for the protection of foods. A loan of \$90,000 enabled the firm to scale up a new biochemical extraction process. In addition to having a positive impact on the environment, the project created significant benefits for the economy of the region, which depends in large part on fishing products. ABK-Gaspésie has so far created nearly 15 jobs and this number could double over the next 15 months.

Despite the results obtained by the FCQ in 1999-2000, the number of projects supported did not meet its objectives. However, by expanding the FCQ program, improving to the approval process, and relaunching activities in the Gaspé peninsula should create a favourable climate to help initiate new projects in 2000-2001.

2.3.3 Job creation and maintenance

Short-term measurement

One of the Agency's objectives is to create and maintain jobs in every region of Quebec. In 1999-2000, projects and initiatives financially supported by the Agency and its partners resulted in the creation of 6,263 jobs and the maintenance of another 6,105. The table below provides an summary of the jobs created and maintained. The list is not exhaustive and comes from a number of sources, including the Agency and its partners follow-up activities, an Annual Survey, and various evaluations conducted by outside firms in 1999-2000.

It should be noted that only partial data is presented here. Not all jobs created and maintained by the Agency's intermediaries and partners were recorded. Indexing all the results, including the number of jobs, would be a very labour-intensive and onerous undertaking that would be difficult to justify.

Program or activity/ partial data	Jobs created	Jobs maintained
IDEA-SME (including agreements with financial institutions but excluding agreements with organizations)	668	567
Program for Export Market Development (PEMD)	87	83
Regional Strategic Initiatives Program (RSI)	915	158
Fund for Coastal Quebec (CQF)	116	167
Community Futures Development Corporations (CFDCs)	4,069	4,776
Groupement des chefs d'entreprise du Québec	226	295
Regional export promotion organizations (ORPEX)	182	59
Total	6,263	6,105

Measurement of long-term impact

The Agency places great importance on the sustainable impact of all its activities. Its ultimate objective is to create sustainable effects. Therefore, in March 2000, for the second consecutive year, the Agency hired an outside firm to measure the long-term impact of its former investments. This survey, based on a sample of enterprises supported in 1996-1997, allowed us to analyse the impact of the projects supported, and determine whether a trend is created.

The results of the study show that the Agency's programs do in fact have a sustainable job creation impact. After three years, the vast majority of jobs created by businesses during the 1996-1997 fiscal year still exist. Actually, there has even been an increase in the number of jobs created. Since 1997, over 265 new jobs directly linked to the projects supported by the Agency have been created by these firms; an average of 2.5 additional jobs per enterprise over the past three years.

This indicator confirms the sustainable effect of the Agency's programs in terms of job creation. The assistance received also had an impact on the nature of jobs, transforming a number of part-time jobs into full-time ones. For the second consecutive year, our study demonstrates that enterprises supported in the past by the Agency have shown continued growth in revenue and in the number of full-time jobs.

2.3.4 Measurement of client satisfaction

The Agency measures client satisfaction rates in order to ensure the quality of its services, to adjust its service delivery and to provide a better response to clients needs. Providing quality client services is considered to be of utmost importance by the employees of the organization. Canada Economic Development was the first Government of Canada organization to obtain an ISO 9002 certification for the delivery of financial and non-financial services to its clients under the IDEA-SME Program.

The Agency measures client satisfaction using evaluation questionnaires sent to clients. It also conducts an annual telephone survey (using a large sample of clients), carried out by an outside firm. The following sections present information on client satisfaction with respect to the Agency's services and those provided through some of its intermediaries and partners.

Over the past five years, this systematic satisfaction measurement approach has resulted in continuous, significant and measureable improvement in the satisfaction of clients with regards to our Agency's services, and has rallied the entire organization behind a common objective: to provide Canadians with quality services.

Satisfaction with services provided directly by the Agency

The following table shows the survey's main results regarding the services provided by the Agency (financial assistance, information and advice) in 1999-2000 from a sample of 363 client enterprises. The survey conducted by an outside firm indicates that client satisfaction remained very high in 1999-2000 for all aspects of services to enterprises.

Key indicators	Percentage of satisfied and fully satisfied clients		
	1997-1998	1998-1999	1999-2000
Services accessibility	95%	97%	95%
Ability to respond to client needs	93 %	96%	94%
Response time for responding to requests	92%	92%	93%
Employee Courtesy	100%	99%	99%
Advisor Professionalism	99%	97%	97%
Overall service quality	97%	98%	97%

It should be noted that this analysis exercise of client satisfaction was also conducted using a sample of client enterprises whose requests for financial assistance were turned down.

Although the satisfaction rate was lower (73% for quality of service), 85% of the enterprises contacted whose requests for assistance were turned down in 1999-2000 still want to do business with the Agency.

Satisfaction with services provided by organizations in the Agency’s business network

The Agency also evaluated the quality of services provided by some intermediaries and partners. The table below shows the main results obtained with regard to satisfaction using a sample of 476 client enterprises of the Agency’s network of intermediaries and partners who participated in the continuous measurement exercise of 1999-2000. Enterprises expressed a high level of satisfaction with services provided by the Agency’s network of intermediaries and partners. This type of service delivery responds to the enterprise’s expectations.

Client Testimony (translation)

“High quality, meticulous and discerning service. Does the Government of Canada proud and provides the greatest possible support to community stakeholders.”

(Source: Annual Survey)

Key indicators	Percentage of satisfied and fully satisfied clients		
	1997-1998	1998-1999	1999-2000
Services Accessibility	94%	96%	95%
Ability to respond to client needs	93%	92%	91%
Response Time to requests	94%	94%	93%
Employee Courtesy	96%	98%	100%
Advisor Professionalism	94%	98%	98%
Overall service quality	94%	97%	96%

Direction of the client satisfaction measurement approach

In 1999-2000, the Agency participated in a pilot project for the creation of a Common Measurement Tool for client satisfaction. The project brought together 11 Government of Canada departments, which allowed for common units of measurement and an overall perspective of client satisfaction for all departments. The Agency plans to keep up its efforts to continuously improve its services.

Measurement of satisfaction with regard to enforcement of the Official Languages Act

The Agency conducts an annual study to monitor compliance with its commitment to the *Official Languages Act*, which stipulates that federal institutions must ensure that the public can communicate and receive services in both official languages.

The study indicated that the accessibility and quality of the Agency's services provided in English is satisfactory to our Anglophone clientele. With regard to the commitment by federal organizations to foster the growth of the Anglophone minority in Quebec, representatives of advocacy groups for Quebec Anglophone communities stated they have noticed improvements. The Agency's efforts are generally well received by this community. Some groups indicated that the Agency needed to become closer to this community and ensure more continuity in some regions.

In addition, the Annual Survey demonstrated that Anglophone clients find it easy or very easy to be served in English by Agency employees and most of those interviewed found the quality of services in English to be very good or adequate.

2.3.5 Lessons learned from recent evaluations and audits

By analysing the evaluation and audit reports carried out during the 1999-2000 fiscal year, a number of observations have helped identify how the Agency can improve the effectiveness of its activities. The lessons learned are broken down into four categories.

Economic results. Once again this year, the reports show that the assistance provided to SMEs is crucial for their projects success. The Agency's financial support helps to create and maintain jobs in a variety of sectors in every region of Quebec. In addition, the guidance services provided by the 13 regional offices play an important role in the growth and development of the enterprises.

On the other hand, despite improvements made in 1999-2000, the Agency must continue to pay special attention with settings objectives to projects, especially at the implementation stage. The objectives needs to be clear, accurate and measurable. As such, the Agency plans to develop a working document containing key program objective indicators, which will also help measure the results.

Partnerships management. The Agency fosters strategic networking among local, municipal, provincial and federal stakeholders in order to provide quality services to its clientele. By establishing and consolidating its role during the projects' development and implementation stages, the Agency must do its best to optimize the use of the resources. Clarifying the roles and responsibilities of each partner in the partnership is an example of how this can be achieved.

Services Delivery. The Agency puts a great emphasis in the quality of service delivery and client satisfaction. Recent client surveys show that the majority of enterprises expressed a high level of satisfaction with regard to the services provided.

The Agency is always seeking ways to improve the delivery of its services and in 2000-2001, will establish several service standards especially for the time it takes to process files. This approach is part of the Government of Canada's improvement service initiative.

Management practices. Management practices are adapted to the government's results-oriented management framework. In 1999, a continuous performance measurement policy was established to facilitate monitoring and assessment of activities.

The Agency must continue its efforts to establish results indicators for each of its programs and projects, so as to facilitate measurement and assessment. The monitoring process must be adjusted to the time frame of projects so as to measure results at each milestone.

Conclusion. The evaluation and audit reports, together with feedback from our clients, are helping us improve the management framework for our activities. The lessons learned from Agency activities are extremely valuable and enable Canada Economic Development to provide its clients with better services.

PART III CONSOLIDATED REPORTING

3.1 Year 2000 preparedness

Starting June 1998, the Agency undertook a variety of activities to remedy any potential interruption of services related to the transition to the year 2000 (Y2K), and to make its clientele aware of the urgency of taking action on this matter. Action, risk management and emergency measures plans were developed and successfully implemented. The Agency took a structured approach to ensure its systems were Y2K compliant, which enabled us to enter the next millennium without any disruption.

3.2 Sustainable development

Since the creation of its Sustainable Development Strategy (SDS) in December 1997, the Agency has joined partners within the Government of Canada, the Government of Quebec and the private sector to carry out many projects related to sustainable development. The Agency's SDS includes four types of activities, divided between two areas—awareness and direct action. The table below provides an overview of this strategy.

	Awareness	Direct Action
External Promotion	<p>Make Quebec SMEs aware of the limitations and commercial potential of sustainable development</p> <p><u>Access to strategic information; access to networks; access to funding</u></p>	<p>Promote the development and marketing of Quebec's environment industry</p>
Internal Promotion	<p>Adjust corporate culture to the new challenge of sustainable development and promote a consolidated vision of economic, social and environmental aspects</p> <p><u>Structure; interest; network; support; monitor</u></p>	<p>Encourage and increase greening within the Agency; ensure maintenance of programs and greening</p> <p><u>Reduce; reuse; recycle; support activities</u></p>

In 2000 report, the Commissioner of the Environment and Sustainable Development of the Auditor General of Canada recognized the Agency's solid performance, stating that: "The Agency's current practices satisfy almost 90 percent of the requirements of the ISO 14001 environmental management systems standard".

External promotion

To promote external awareness of the strategy, the Agency has produced and published two brochures to inform SMEs and make them aware of environmental issues and federal financial assistance programs for the development and marketing of innovative environmental technology.

Success Story

The Trois Rivières Enviroclub is an in-plant environmental learning pilot project that combines cost-effectiveness and sustainable development. It has enabled 13 local enterprises to learn about environmental management and demystify the pollution prevention process. The Agency contributed to this project in partnership with Environment Canada and the Trois Rivières CEGEP. Most participants in the Enviroclub project stated they were very satisfied and were even able to realize annual savings evaluated at tens of thousands of dollars.

The Agency's objective is to enhance the awareness of SMEs and to make them more qualified in sustainable development practices. As such, the Agency supported the development of the ENVIROCLUB concept (see box, left) fits in with its . It is from this same standpoint that the Agency is involved with regional partners, including the Estrie Regional Environment Council and the *Maison régionale de l'industrie* to develop front-line services in innovation and environmental management for small enterprises.

As for the external promotion of the development and marketing of the environmental industry, in 1999-2000, the Agency invested in the startup of about a dozen projects in the field of environment and sustainable development in partnership with government and community organizations. The project described in the box is an example of the type of initiative receiving financial support from the Agency. For example, in co-operation with Environment Canada, the Agency has contributed to the startup of projects to introduce electric vehicles into corporate fleets, recover and convert steel dust and use a compost based on liquid manure and sawmill waste.

Success Story

Technologies ECT5, a Rouyn-Noranda firm, has developed a new technology based on electrolysis, which allows for the recovery of metal in the waste water from mine sites. The firm received repayable financial assistance of \$170,800 to test demonstration units. The company anticipates substantial income growth in 2000-2001.

In 1999-2000, the Agency approved about \$2M for a variety of projects, generating investments of just over \$8M. Since 1997, about 50 projects related to the environment and sustainable development have received Agency support.

Internal Promotion

Promoting awareness of the SDS internally received special attention, so that the organizational culture may adjust to the new challenges of sustainable development by promoting a comprehensive vision of the economic, social and environmental aspects of the cause. With this in mind, the Agency offered a session to its advisors regarding development opportunities associated with sustainable development, and the threats resulting from non-tariff barriers. About a dozen articles related to sustainable development and the environment were included in the Agency's electronic newsletter. In addition, a SDS checklist is now given to each new employee.

To internally promote greening activities with the aim of increasing these types of activities within the Agency, paper recycling programs have been implemented in every office and a multi-product recycling program has been set up in three regional offices. The Agency has also put forward a new furniture and equipment maintenance program intended to prolong their useful life.

Finally, in order to continue improving its SDS management practices, the Agency has made sustainable development a part of its day-to-day operations; using its supports service delivery ISO 9002 quality management system.

PART IV FINANCIAL PERFORMANCE

4.1 Overview

The Agency's total authorities, consisting of the Main Estimates and the Supplementary Estimates voted by Parliament, stand at \$299.2M. The Agency's actual expenditures of \$258.0M were 14% less than this amount. The discrepancy results mainly from necessary legal requirements. The Agency had to reprofile funds from 1999-2000 to subsequent years (\$31.1M) to respond to commitments of the IDEA-SME Program, the Fund for the Economic Development and Adjustment of Quebec Fishing Communities and the Canada Infrastructure Works. In another hand the TERP Program has phased out resulting in a \$8.0M undisbursed balance.

4.2 Financial summary tables

Canada Economic Development for Quebec Regions is required to produce the following financial tables for 1999-2000:

Financial Table 1	Summary of Voted Appropriations
Financial Table 2	Comparison of Total Planned
Financial Table 3	Historical Comparison of Total Planned Spending to Actual Spending
Financial Table 4	Non-Respendable Revenues
Financial Table 5	Statutory Payments
Financial Table 6 and 6a	Transfer Payments
Financial Table 7	Contingent Liabilities

Financial Table 1 Summary of Voted Appropriations
Financial requirements by authority

(in millions of dollars)

Canada Economic Development for Quebec Regions		1999-2000		
Vote		Planned	Total	Actual
55	Operating expenditures	29.7	32.5	30.9
60	Grants and contributions	210.3	188.1	148.5
(L)	Obligations under the <i>Small Business Loans Act</i>	93.0	74.9	74.9
(L)	Contributions to employee benefit plans	3.4	3.7	3.7
(L)	Refund of amounts credited to revenues in previous years	--	0.04	0.02
(L)	Spending of proceeds from disposal of Crown assets	--	0.03	0.02
Agency total		336.4	299.2	258.0

Note:

The \$1.2M difference between planned spending and actual spending in the operating budget results from the additional funds received to set up Service Canada, prepare for implementation of the financial information strategy and offset the increased salary costs expected to result from renewal of some collective agreements.

The difference of \$61.8M between planned spending and actual spending in the grants and contributions budget is explained by the end of the TERP and ERAP programs (\$28.0M), the deferral of statutory requirements to following years (\$31.1M) and the delays encountered in some regions to allow for consultation with the community. These delays meant that the approval of some regional strategies had to be postponed (\$2.7M).

Financial Table 2 Comparison of Total Planned Spending to Actual Spending
 Agency planned versus actual spending

(in millions of dollars)

Promotion of the economic development of the regions of Quebec	1999-2000		
	Planned spending	Total authorities	Actual Spending
FTEs¹	282.0	282.0	291.0
Operations ²	33.1	36.2	34.6
Grants and contributions ³	303.3	263.0	223.4
Total gross expenditures	336.4	299.2	258.0
Less:			
Respendable revenues	--	--	--
Total net expenditures	336.4	299.2	258.0
Other revenues and expenditures:			
Non-respendable revenues ⁴	(40.5)	(40.5)	(52.9)
Cost of services provided by other departments	3.0	3.0	3.1
Net cost of program	298.9	261.7	208.2

1 The number of full-time equivalents (FTEs) is expressed in units.

2 Including contributions to employee benefit plans.

3 Details on grants and contributions are shown in Table 6A.

4 Details on non-respendable revenues are shown in Table 4.

Financial Table 3 Historical Comparison of Total Planned Spending to Actual Spending

(in millions of dollars)

	Actual Spending 1997-1998	Actual Spending 1998-1999	1999-2000		
			Planned Spending ¹	Total Authorities ²	Actual ³ Spending
Promotion of the Economic Development of the Regions of Quebec	360.9	328.6	336.4	299.2	258.0
Total	360.9	328.6	336.4	299.2	258.0

1 The planned spending and planned revenue figures are consistent with those in the "Planned Spending, 1999-2000" column of Part III of the 1999-2000 Estimates.

2 The total authorities figures include those in the Main, Supplementary and other estimates, and correspond to those indicated in the Public Accounts for 1999-2000.

3 The actual expenditures and actual revenue figures are consistent with those in the Public Accounts for 1999-2000.

Financial Table 4 Non-respendable Revenue

(in millions of dollars)

	Actual Revenues 1997-1998	Actual Revenues 1998-1999	1999-2000		
			Planned Revenues	Total Authorities	Actual Revenues
Promotion of the Economic Development of the Regions of Quebec	37.6	42.3	40.5	40.5	52.9
Total non-respendable revenues	37.6	42.3	40.5	40.5	52.9

Note:

Non-respendable revenue consists essentially of:

- service fees for loan guarantees, which represent the fees paid by borrowers approved under the *Small Business Loans Act (SBLA)*, the *Canada Small Business Financing Act (CSBFA)* and the Loan Insurance component of the Atlantic Enterprise Program;
- repayment of repayable contributions provided by the Agency.

The \$12.4M difference between planned spending and actual spending is explained as follows:

- \$8.4M in additional service fees. Anticipated revenue was under valuated because the *SBLA* program ended on March 31, 1999 and the *CSBFA* had not been approved when the forecasts were made;
- an additional \$2.3M from the repayment of repayable contributions.

Financial Table 5 Statutory Payments

(in millions of dollars)

	Actual Spending 1997-1998	Actual Spending 1998-1999	1999-2000		
			Planned Spending	Total Authorities	Actual Spending
Promotion of the Economic Development of the Regions of Quebec	122.5	106.6	96.4	78.5	78.5
Total statutory payments	122.5	106.6	96.4	78.5	78.5

Note: The total authorities are equivalent to the sum of the Main, Supplementary and other estimates.

Statutory payments consist of the obligations assumed under the *Small Business Loans Act* and contributions to employee benefit plans.

The difference between planned spending and actual spending results from the obligations assumed under the *Canada Small Business Financing Act*, since a financial institution especially active in Quebec reached its demand limit and thus limited spending.

Financial Table 6 Transfer Payments

(in millions of dollars)

	Actual Spending 1997-1998	Actual Spending 1998-1999	1999-2000		
			Planned Spending	Total Authorities	Actual Spending
Promotion of the Economic Development of the Regions of Quebec					
Grants	0.9	5.2	0.3	0.3	0.3
Contributions	327.4	288.3	303.0	262.7	223.1
Total grants and contributions	328.3	293.5	303.3	263.0	223.4

Note:

In 1998-1999, a \$5M grant was awarded to the *Conseil québécois des entreprises adaptées* to create a development fund to help member enterprises improve and maintain their productivity so as to be competitive.

Financial Table 6a Description of funds distribution by program

(in millions of dollars)

Programs	Planned spending	Total authorities	Actual
IDEA-SME Program	64.6	60.9	51.2
Regional Strategic Initiatives Program (RSI)	55.0	52.3	52.3
Infrastructure Works Program	35.2	35.2	15.3
Community Futures Program (CFP)	20.0	24.6	24.6
Coastal Quebec Fund (FCQ)	4.8	4.8	2.8
Temporary Economic Reconstruction Program (TERP)	9.8	9.8	1.8
Economic Recovery Assistance Program (ERAP)	20.0	0.0	0.0
Former programming	0.9	0.5	0.5
<i>Small Business Loans Act (SBLA)</i>	93.0	74.9	74.9
Total	303.3	263.0	223.4

Further variance details are shown in Appendix I.

Financial Table 7 Contingent Liabilities

(in millions of dollars)

List of Contingent Liabilities	Amount of Contingent Liability		
	March 31, 1998	March 31, 1999	Current as of March 31, 2000
Loans			
<i>Atlantic Enterprise Program</i> ¹	1.9	1.5	0.9
<i>Small Business Loans Act</i> ²	423.2	388.7	299.8
<i>Canada Small Business Financing Act</i> ²	--	--	88.2
Total	425.1	390.2	388.9

1 Represents loan guarantees under the *Atlantic Enterprise Program*. Under this program, the federal government guaranteed loans to establish, expand or modernize commercial business operations in the Gaspé Peninsula, Magdalen Islands and Atlantic provinces. In accordance with the Order in Council P.C. 1991.1114 dated June 13, 1991, responsibility for loan guarantees within the Province of Quebec is assumed by Canada Economic Development.

2 Represents loan guarantees under the *Small Business Loans Act*. This legislation, which was passed in January 1961, is designed to increase the availability of loans and to establish, expand, modernize and upgrade small business enterprises. In accordance with the Order in Council P.C. 1991.1114 dated June 13, 1991, responsibility for loan guarantees within the Province of Quebec is assumed by the credits of Canada Economic Development. Although this act has been repealed, it continues to apply to loans provided prior to April 1, 1999. The *Canada Small Business Financing Act*, which replaces the *Small Business Loans Act*, applies only to loans provided after March 31, 1999.

PART V AGENCY OVERVIEW

5.1 Mandate, responsibilities and roles

Mandate

To promote the economic development of the regions of Quebec.

Responsibilities

Section II of the *Department of Industry Act* defines the responsibilities of the Minister responsible for Canada Economic Development. In terms of regional economic development in Quebec, the Minister responsible for the Agency must oversee the preparation of approaches, policies and programs, the establishment of co-operative relationships with partners, the delivery of programs and services and the analysis and dissemination of information.

Roles

Design and implementation of relevant economic development programming, with a view to participation in the achievement of national priorities, harmonization of federal activities, establishment of co-operative relations with public and private stakeholders, advocacy with the machinery of the Government of Canada, promotion of federal programs and services, development of knowledge and the dissemination of information.

5.2 Operating framework

Canada Economic Development as a member of the Industry Portfolio and, as such, reports and is accountable to the Minister of Industry, who, in his responsibilities with reference to the regions of Quebec, is supported by a Secretary of State.

Under the *Department of Industry Act*, the Minister responsible for the Economic Development Agency of Canada for the Regions of Quebec must pursue the following objectives:

- To promote economic development in areas of Quebec where low incomes and slow economic growth are prevalent or where opportunities for productive employment are inadequate;
- To emphasize long-term economic development and sustainable employment and income creation; and
- To focus on small- and medium-sized enterprises and the development and enhancement of entrepreneurial talent.

5.3 Agency organization

Canada Economic Development's head office is located in Montreal. The Agency also has a network of 13 regional business offices in the regions of Quebec and an office in Hull, which ensures liaison with federal departments and the central agencies. The Agency also provides services through its Internet site (<http://www.dec-ced.gc.ca>).

5.4 Program summary

IDEA-SME Program

This program is intended for a clientele made up of Quebec SMEs and SME support organizations. IDEA-SME provides services and funds activities in the following areas of activity:

- **I**nnovation, research and development, design
- **D**evelopment of markets
- **E**xport marketing
- **A**nd entrepreneurship and development of business climate

Regional Strategic Initiatives (RSI)

This program provides support for major initiatives likely to have a growth-generating impact on regional economy. It thus fosters the development of a socio-economic climate favourable to greater competitiveness, development and economic growth in the regions of Quebec in the context of globalization of the economy. Activities supported by the program fit in with a strategy and action plan built on the federal value-added, developed jointly with other federal departments and organizations complementing their own activities and those of community organizations and the private sector. The program also allows for national policies and programs with a marked impact on the economy of various regions of Quebec to be regionally adjusted or extended.

Community Futures Program (CFP)

The CFP is a national program that supports communities in every region of the country, to take charge of their own economic development. In Quebec, the CFP provides financial support to 54 Community Futures Development Corporations (CFDCs), to enable them in providing technical advice for small businesses, support them financially and stimulate the creation of local economic development initiatives. The program also supports 16 Community Economic Development Corporations (CEDCs), of which 2 agreements will be approved shortly. These CEDCs are distributed among the island of Montreal, Quebec City, Sherbrooke and Hull, enabling them to carry out similar activities in disadvantaged districts. Lastly, the CFP has begun providing support to seven Business Development Centres (BDCs) in regions not serviced by a CFDC or CEDC.

Costal Quebec Fund

This fund, also known as the Special Fund for the Economic Development and Adjustment of Quebec fishing communities, is intended to implement measures to support economic and community development of communities affected by the restructuring of the fishing industry (Côte-Nord and Gaspésie/Îles-de-la-Madeleine administrative regions, and adjacent fishing communities).

5.5 Business volume

The following table shows the changes in number of financial assistance and information-advice files handled directly by the Agency under its main programs, together with those handled by some of its partners.

Programs/Fiscal year Financial projects and requests for information- advice	Number of projects ¹		
	1997-1998	1998-1999	1999-2000
IDEA-SME (including projects under the Coastal Quebec Fund - CQF)	1,400	1,033	1,085
Requests for info-advice under IDEA-SME	480	321	303
Program for Export Market Development (PEMD) ²	100	102	109
Regional Strategic Initiatives (RSI)	12	64	211
Sub-total	1,992	1,520	1,708
Community Futures Program (PDC) ³	62	170	136
Total	2,054	1,690	1,844

Some partners deliver programs and services to SMEs on behalf of the Agency. These services include information and advice, business diagnosis tools, financial assistance through investment funds and other business support services.

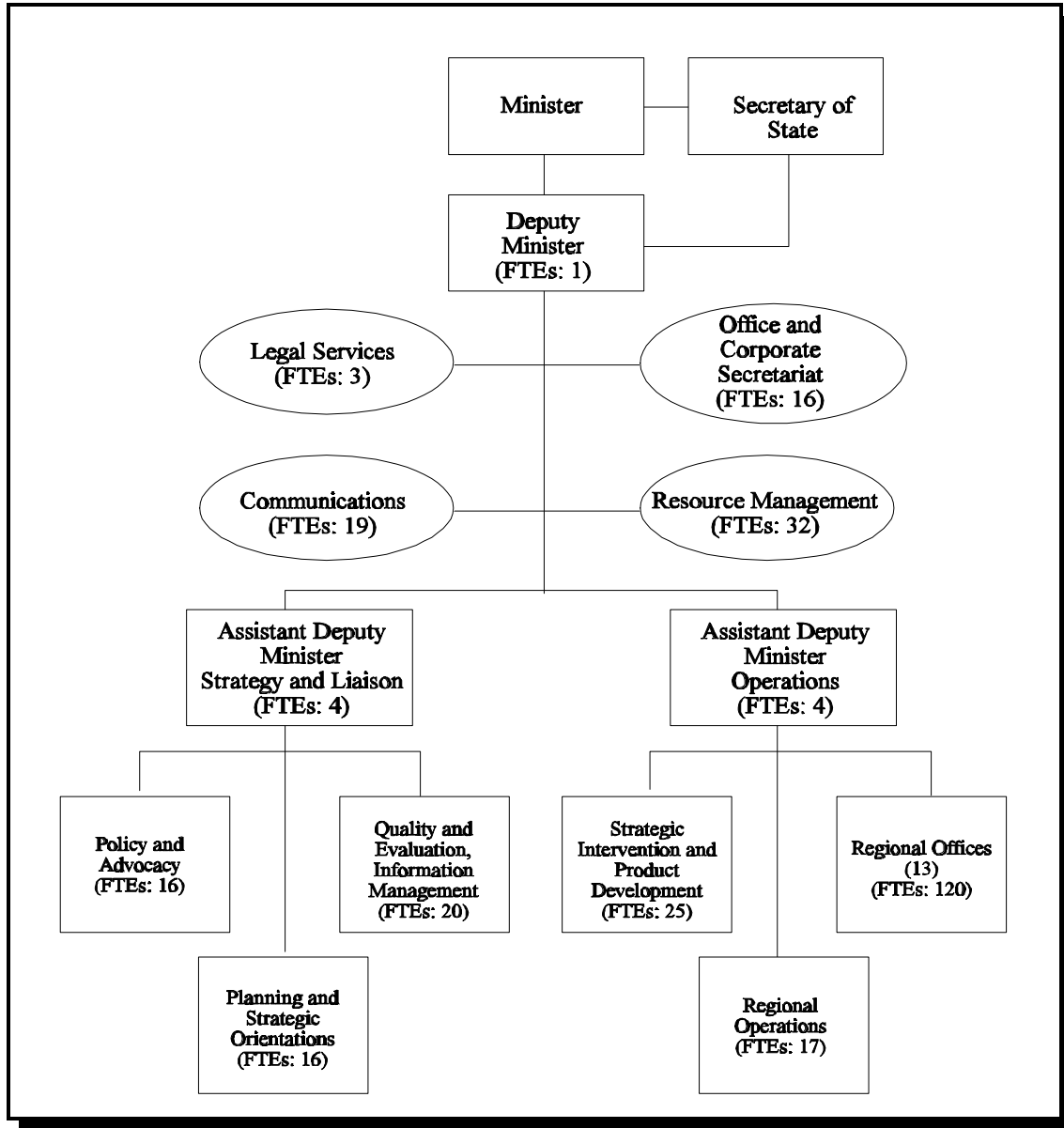
1 Includes all financial files analysed, both accepted or refused, subject to a final decision in 1999-2000, as well as requests for information-advice.

2 The PEMD is delivered by the Agency, but the Department of Foreign Affairs and International Trade (DFAIT) is responsible for program budgets and expenditures.

3 All agreements signed with the following organizations: CFDCs, CFDC Network, BDCs and CEDCs. A number of agreements may be doubled over and used for specific programs (ex.: Youth Strategy).

5.6 Organization chart

Canada Economic Development for Quebec Regions



PART VI OTHER INFORMATION

6.1 Contact for further information

Denis Boulianne
Director General,
Quality and Evaluation, Information Management
Canada Economic Development for Quebec Regions
Tour de la Bourse
800 Victoria Square
Suite 3800, Post Office Box 247
Montreal, Quebec H4Z 1E8

Telephone: (514) 283-7982

Facsimile: (514) 283-0041

Internet address: Denis.Boulianne@dec-ced.gc.ca

Canada Economic Development reports available upon request.

6.2 Legislation administered

The Minister has sole responsibility to Parliament for the following Acts:

Department of Industry Act (S.C. 1995, ch. c. 1)

The Minister shares responsibility to Parliament for the following Acts:

Small Business Loans Act (S.C., 1993, ch. c. 6)

Canada Small Business Financing Act (S.C., 1998, ch. c. 36)

6.3 References

List of Canada Economic Development offices

Montreal (Head Office)

Stock Exchange Tower
800 Victoria Square
Suite 3800, PO Box 247
Montreal, Quebec H4Z 1E8

(514) 283-6412
Fax: (514) 283-3302

Hull (Policy and Advocacy)

Place du Portage, Phase II
165 Hôtel de Ville Street
PO Box 1110, Station B
Hull, Quebec J8X 3X5

(819) 997-3474
Fax: (819) 997-3340

BUSINESS OFFICES

Abitibi-Témiscamingue

906 5th Avenue
Val d'Or, Quebec J9P 1B9

(819) 825-5260 ● 1-800-567-6451
Fax: (819) 825-3245

Bas-Saint-Laurent/Gaspésie/Îles-de-la-Madeleine

General Trust of Canada Building
2 Saint-Germain Street East, Suite 310
Rimouski, Quebec G5L 8T7

(418) 722-3282 ● 1-800-463-9073
Fax: (418) 722-3285

Centre du Québec

Place du Centre
150 Marchand Street, Suite 502
Drummondville, Quebec J2C 4N1

(819) 478-4664 ● 1-800-567-1418
Fax: (819) 478-4666

Côte-Nord

701 Laure Blvd, 2nd floor
Suite 202B, PO Box 698
Sept Îles, Quebec G4R 4K9

(418) 968-3426 ● 1-800-463-1707
Fax: (418) 968-0806

Estrie

Andrew Paton Place
65 Belvedere Street North, Suite 240
Sherbrooke, Quebec J1H 4A7

(819) 564-5904 ● 1-800-567-6084
Fax: (819) 564-5912

Île-de Montréal

Tour de la Bourse
800 Victoria Square
Suite 3800, P O Box 247
Montreal, Quebec H4Z 1E8

(514) 283-2500
Fax: (514) 496-8310

Laval - Laurentides - Lanaudière

Tour Triomphe II
2540 Daniel Johnson Blvd, Suite 204
Laval, Quebec H7T 2S3

(450) 973-6844 ● 1-800-430-6844
Fax: (450) 973-6851

Montérégie

Complexe Saint-Charles
1111 St Charles Street West
Suite 411
Longueuil, Quebec J4K 5G4

(450) 928-4088 ● 1-800-284-0335
Fax: (450) 928-4097

Outaouais

259 Saint-Joseph Blvd
Suite 202
Hull, Quebec J8Y 6T1

(819) 994-7442 ● 1-800-561-4353
Fax: (819) 994-7846

Saguenay/Lac St Jean

170 St Joseph Street South
Suite 203
Alma, Quebec G8B 3E8

(418) 668-3084 ● 1-800-463-9808
Fax: (418) 668-7584

Mauricie

Bourg du Fleuve Building
25 des Forges Street, Suite 413
Trois Rivières, Quebec G9A 2G4

(819) 371-5182 ● 1-800-567-8637
Fax: (819) 371-5186

Nord-du-Québec

Tour de la Bourse
800 Victoria Square
Suite 3800, PO Box 247
Montreal, Quebec H4Z 1E8

(514) 496-7609 ● 1-800-561-0633
Fax: (514) 283-3637

Québec/Chaudière-Appalaches

John Munn Building
112, rue Dalhousie, 2nd Floor
Quebec City, Quebec G1K 4C1

(418) 648-4826 ● 1-800-463-5204
Fax: (418) 648-7291

Canada Economic Development Virtual Office

<http://www.dec-ced.gc.ca>

6.4 Corporate documents

Addresses of Business Offices (leaflet) - [May 2000]

2000-2001 Estimates, Report on Plans and Priorities - [April 2000]

E-Commerce: Supporting Market Development, Innovation and Entrepreneurship - [September 1999]

Quebec Economy: Analysis of Trends - [May 2000]

Multimedia Experimentation Fund - [May 1999]

IDEA-SME - [January 1998]

IDEA-SME for the Environmental Industry - [March 1999]

Quality Objective: Aiming for Excellence - ISO 9002 Certification for the IDEA-SME Program - [June 1999]

A Partner in Your Growth - [September 1998]

Quality Policy (leaflet) - [June 1999]

6.5 Regional Documents

Rural Enterprises (Bas-Saint-Laurent — Gaspésie — Îles-de-la-Madeleine and Côte-Nord) - [September 1998]

Estrie. Development Fund for Innovative Business - [May 2000]

Coastal Quebec Fund (Bas-Saint-Laurent — Gaspésie — Îles-de-la-Madeleine and Côte-Nord) - [March 2000]

The Amiante MRC. A Dynamic Community Partner - [June 1999]

Québec — Chaudière-Appalaches Technoregion - [December 1998]

6.6 Other Documents

State of the economy at a glance (August 2000)

Socio-economic profiles of Quebec Regions (April 2000)

Intermediary groups and the organization of services to enterprises (March 1998)

Sustainable Development Strategy (June 1998)

These documents may be obtained from:

Info entrepreneurs

5 Place Ville-Marie
Plaza Level, Suite 12500
Montreal, Quebec H3B 4Y2

(514) 496-INFO ! 1-800-322-INFO

Fax.: (514) 496-5934

Ressources Entreprises

825 Sainte-Thérèse Street
Quebec City, Quebec G1N 1S6

Telephone : (418) 649-4636

Fax.: (418) 682-1144

Internet: www.infoentrepreneurs.org

PART VII APPENDICES

Appendix I Explanation of financial discrepancies

The IDEA-SME and RSI Programs are the Agency's two most important initiatives for providing financial assistance for SMEs and SME support organizations. Since programs are complementary, budgetary expenditures are planned on the basis of the total budget for the two programs, although planned spending and actual spending for the two programs are shown separately.

IDEA-SME Program

Planned spending under the IDEA-SME Program in 1999-2000 totalled \$64.6M, while actual spending was limited to \$51.2M, a variance of \$13.4M.

This discrepancy is explained by the deferral of statutory requirements to following years, an amount of \$8M. This deferral results from delays in some projects approved under the Program. In addition, the Agency decided to transfer \$4.6M to the Community Futures Program (CFP) in order to meet the specific needs of rural communities.

Regional Strategic Initiatives (RSI) Program

Planned spending levels for 1999-2000 for the Regional Strategic Initiatives (RSI) Program were set at \$55M when the Report on Plans and Priorities was being prepared. Actual spending in 1999-2000 for this program was \$52.3M, a slight variance of \$2.7M from the established forecast.

This variance resulted from the delays encountered in some regions in order to carry out a large number of consultations with the community. Because of the delays, some regional strategies could not be approved before the end of 1999-2000.

Community Futures Program (CFP)

The variance between actual spending of \$24.6M and planned spending of \$20M is explained in large part by the Agency's decision to recapitalize the investment funds of some Community Futures Development Corporations (CFDCs). In addition, the Youth Investment Funds of all the CFDCs were increased.

Canada-Quebec Infrastructure Works Program

The planned spending of \$35.2M for the Canada-Quebec Agreement on the Infrastructure Works Program was based on projections provided by the Quebec Department of Municipal Affairs and Montreal, the project leader for the program. Since about 100 projects were not completed within the planned schedules, it was impossible to pay out all the forecast amounts. Actual spending under this program thus totalled \$15.3M and the amounts were carried forward to subsequent years on the basis of the estimated work completion dates.

Coastal Quebec Fund (CQF)

The \$4.8M provided for the Coastal Quebec Fund (CQF) in the budget took into account the amounts carried forward from 1998-1999 and the expected end of Phase 1 of the program on March 31, 2000.

Despite the efforts made in such sectors as mariculture, the closure of Gaspésia in Chandler and the termination of Noranda's mining operations in Murdochville had a devastating effect on the socio-economic climate of the Gaspé region. As a result of this, several projects being developed by entrepreneurs under this program were brought to a halt. Extension of the CQF Program and revitalization of activities in the Gaspé region should create a more favourable climate to the startup of new projects in 2000-2001.

Temporary Economic Reconstruction Program (TERP)

Since this program phased out in October 1998, the variance between the actual spending of \$1.8M and the planned spending of \$9.8M can be explained mainly by the fact that planned spending consisted of the uncommitted balance from the \$25M budget envelope earmarked for the program when it was approved in 1996. The funds allocated could not be used for other purposes, and since fewer projects were approved than had been expected when the program was announced, an undisbursed balance has resulted.

Economic Recovery Assistance Program (ERAP)

This program phased out September 30, 1998, and the planned spending of \$20M is the balance of the allocation earmarked for it until March 31, 2000. Fewer requests for assistance were received under this program than expected, and, since the funds allocated to the program could not be used for other purposes, the amount represents the undisbursed balance of the budget for this program.

Appendix II Intermediaries and partners

List of intermediaries and Agency partners whose results are included in this report.

Community Futures Development Corporations (CFDCs)

Abitibi-Ouest	Îles-de-la-Madeleine (Des)
Achigan-Montcalm	Kamouraska
Acton Inc. (Région d')	Lac Saint-Jean Est inc.
Amiante inc. (De l')	Lac Saint-Jean Ouest inc. (Sté de développ.)
Antoine-Labelle	La Mitis
Arthabaska-Érable inc.	Laurentides inc.
Asbestos (Région d')	Manicouagan
Baie-des-Chaleurs	Maria-Chapdelaine inc.
Barraute-Senneterre-Quevillon inc.	Maskinongé (MRC de)
Basques (Des)	Matagami
Bas Richelieu (Du)	Matane (Région de)
Bellechasse-Etchemins inc.	Matapédia inc.
Centre de la Mauricie (Le Groupe Forces)	Matawinie inc.
Charlevoix inc.	Mégantic (Région de)
Chibougamau-Chapais inc.	Neigette
Coaticook (Région de)	Nicolet-Bécancour inc.
Côte-Nord inc.	Papineau
Eeyou Economic Group CFDC inc.	Pontiac (Du)
D'Autray	Portneuf inc.
Fjord (Du)	Rivière-du-Loup (MRC de)
Gaspé	Rocher-Percé inc.
Gaspé-Nord	Rouyn-Noranda régional inc. (Du)
Harricana inc.	Témiscamingue (Sté de développement du)
Haut-Saguenay (SADEC du)	Témiscouata (De)
Haut-Saint-François	Vallée de la Batiscan
Haut-Saint-Maurice inc. (Du)	Vallée de la Gatineau
Haute-Côte-Nord	Vallée de l'Or

Le Groupement des chefs d'entreprise du Québec

Regional Export Promotion Organizations (ORPEX)

World Trade Centre

Estrie International 2007 inc.

Corporation régionale de promotion des exportations du Bas-Saint-Laurent

Gaspésie and Magdalen Islands Marketing Secretariat (SMMGIM)

Saguenay/Lac St Jean Regional Export Development Service (Serdex)

Société de promotion économique du Québec métropolitain (SPÉQEM)

Chaudière-Appalaches Export

Centre de commerce international de l'Est du Québec

Corporation Mauricie international

Corporation de développement international centre du Québec

Service d'exportation Richelieu-Yamaska

Club Export des Cantons de l'est

SDE-Rive-sud de Montréal

Lanaudière économique

Laval Technopole

Laurentides international

48° Nord international (Abitibi)

Lower St Lawrence Export Promotion Corporation (Corpex)

Chambre de commerce et de l'industrie de l'Est de l'Île de Montréal

List of technology incubators

Centre de développement d'entreprises technologique de l'Outaouais

Centre de haute technologie (in the Saguenay)

Centre de l'entrepreneurship technologique

Centre d'entreprise et d'innovation de Montréal

Centre québécois de l'industrie de la biotechnologie (Laval)

Centre régional d'entrepreneurship (in the Eastern Townships)

Incubatech du Montréal métropolitain

Inno-centre (virtual incubator)

Community Economic Development Corporations (CEDCs)

Ahuntsic - Cartierville CEDC

Carrefour de relance de l'économie et de l'emploi du centre de Québec et de Vanier (CREECQ)

Centre-Nord CEDC

Centre-Sud / Plateau Mont-Royal CEDC

Corporation de développement de l'Est (CDEST)

Corporation de solidarité du PRESQ de l'Est de l'Outaouais

Côte-des-Neiges / Notre-Dame-de-Grâce CEDC

Économie communautaire de Francheville (ÉCOF)

Gatineau CEDC

Hull CEDC

Regroupement pour la relance économique et sociale du Sud-Ouest (RESO)

Rosemont / Petite Patrie CEDC

Sherbrooke CEDC

Transaction pour l'emploi inc.

Appendix III Agency quality policy

In order to meet client needs and expectations, Canada Economic Development is committed to respond to the specific needs of SMEs and non-profit organizations that support them.

Providing quality services means meeting client expectations.

Customized service

- ◆ Made to measure
- ◆ Close attention to client needs
- ◆ Understanding of their regional situation
- ◆ Flexibility in providing services

Professional and courteous personnel

- ◆ Highly qualified advisors and personnel
- ◆ Competitive hiring process, based on competencies
- ◆ Training and development plan
- ◆ Continuous evaluation

Accessible service

- ◆ Thirteen business offices
- ◆ Services provided in both official languages
- ◆ Response time continuously evaluated

Confidential service

- ◆ Commitment to professional secrecy and oath of allegiance
- ◆ Documents protected under the *Access to information Act* and the *Privacy Act*
- ◆ Secure premises

INDEX

A

Aboriginals · 7, 8, 13, 14
Access to information · 7, 11, 73
Action Strategy for Greater Montreal ·
23, 26

B

BDCs · 28, 55, 56
Business climate · 1, 8, 13, 23, 54
Business Development Centres · 28, 55
Business offices · 7, 54, 60, 62, 73

C

Canada Business Service Centres · 11
Canada-Quebec Infrastructure Works ·
27, 67
CBSCs · 11
CEDCs · 28, 29, 55, 56, 72
CFDCs · 9, 12, 26, 28, 30, 32, 55, 56,
67, 69
CFP · 28, 50, 55, 66, 67
Coastal Quebec Fund · 50, 56, 62, 67
Communities · 7, 8, 12, 15, 16, 26, 28,
30, 36, 43, 55, 66

Community Economic Development
Corporations · 28, 29, 55, 72
Community Futures Development
Corporations · 9, 12, 14, 28, 30, 32, 55,
67, 69
Community Futures Program · 28, 50,
55, 56, 66, 67
CQF · 32, 56, 67

E

Economic Recovery Assistance
Program · 50, 68
Electronic commerce · 16, 17, 21
Entrepreneurship · 7, 8, 11, 13-15, 29,
54, 62
ERAP · 44, 50, 68
Export marketing · 3, 6-8, 11, 19-21, 54

G

Globalization · 1, 3-5, 7, 8, 11, 13, 26,
55

I

IDEA-SME · 20, 32, 34, 43, 50, 54, 56,
62, 66
Info-fairs · 12

Innovation · 1, 3, 6-8, 11, 13, 15, 17-19,
23, 30, 40, 54, 62
International · 6-8, 20-25, 56, 70
ISO · 34, 40, 41, 62

M

Mandate · 3, 53
Market · 5, 7, 11, 18-22, 25, 30, 32, 56,
62
Market development · 20, 21, 32, 56, 62
Mission · 2, 14, 21, 22

O

Observatory · 13

P

Partnership · 12-14, 17-19, 28, 37, 40
Performance measurement · 9, 37

R

Regional Strategic Initiatives · 15, 20,
23, 32, 50, 55, 56, 66
Regions · 1, 1-4, 6-10, 13, 14, 16, 17,
20, 21, 23, 25, 26, 28-30, 36, 43-49,
53-55, 57, 59, 63, 66
RSI · 23, 24, 32, 50, 55, 56, 66
Rural · 7, 14, 26, 28, 62, 66
Rural enterprise · 26

S

Sustainable development · 17, 39-41, 63

T

Technological development · 17, 19, 23
Technology · 2, 3, 5, 6, 8, 15, 16, 18, 19,
22-24, 26, 40, 71
Technology incubators · 16, 71
Technopole · 26, 70
Technoregion · 19, 62
Temporary Economic Reconstruction
Program · 50, 67
TERP · 43, 44, 50, 67
Tourism · 23-25

Y

Youth · 7, 13-15, 28, 56, 67
Youth Strategy · 14, 28, 56