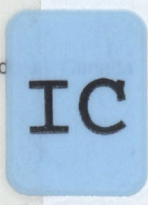


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A STRATEGY FOR THE CANADIAN ENVIRONMENTAL INDUSTRY

March 1996

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INTRODUCTION TO THE STRATEGY UPDATE

The purpose of this report is to provide an update on the progress made in implementing the initiatives contained in the Canadian Environmental Industry Strategy (CEIS). Areas of significant programs and planned actions are highlighted.

The CEIS was announced in September 1994. This package of twenty-two initiatives was developed following many months of dialogue and consultations with industry representatives, associations, provincial governments and numerous other stakeholders across Canada. The strategy emphasizes the need for a strong cooperative effort between the many individuals and organizations, in both industry and government, to build a major Canadian global presence from the early successes of this important sector.

The Canadian environmental sector has become a significant contributor to the Canadian economy, with annual revenues of \$11 billion. It is one of Canada's fastest growing industries. The sector's 4,500 firms, most of which are small- and medium-sized, employ over 150,000 workers. These entrepreneurial companies offer the technologies, products and services that permit innovative solutions for the treatment and prevention of pollution, and that offer state-of-the-art environmental management services.

The CEIS initiatives are led with a "Team Canada" approach, involving Industry Canada, Environment Canada, the Department of Foreign Affairs and International Trade, and Public Works and Government Services Canada. In achieving the progress under the strategy, however, no group has been more important than the Canadian environmental industry itself.

Collectively, the many progressive initiatives in the CEIS have opened the path for sustained expansion of the environmental industry. It is now time for all those with a stake in the industry to work even harder to ensure that the opportunities, competitiveness and growth continue well into the 21st century.

CANADA'S CORE ENVIRONMENTAL INDUSTRY STRATEGY

Delivering Federal Government Support to the Industry in a Direct, Easily Accessible, Service-oriented and Cost-effective Way

Initiative 1: Simplified Access to Government Services

A focal point for government programs, activities, service and knowledge will be established on a province-by-province basis, where appropriate. Through this "hub" concept, a full range of support services for firms will be provided.

Progress and plans

- Work on a prototype is underway. The first pilot will be launched in Ontario in the spring of 1996. Key partners from industry and government include the Ontario chapter of the Canadian Environment Industry Association, the Ontario Ministry of Environment and Energy, the Ontario Centre for Environmental Technology Advancement, Environment Canada, and Industry Canada.
- Feedback from the pilot will facilitate the development of a national network of delivery systems beginning in late 1996 to 1997.

Initiative 2: Forum of Federal and Provincial Ministers of Industry and Environment

A forum of federal and provincial Ministers of Industry and Environment will be held to discuss implementation of the Environmental Industry Strategy as well as harmonization with provincial programs in support of the environmental industry.

Progress and plans

- In view of the logistical and emerging fiscal considerations, a meeting at the ministerial level is unlikely to be held in the foreseeable future.
- Discussions amongst officials on the promotion of the environmental industry will continue in the context of initiative 1: *Simplified Access to Government Services*.

Supporting the Promising Development and Commercialization of Innovative Environmental Technologies

Initiative 3: Environmental Technology Development and Demonstration Initiative

This initiative was intended to directly support technology commercialization and technological demonstrations, giving priority to pollution prevention technologies and processes.

Under the Networks of Centres of Excellence Phase II program, the environment is identified as one of five target areas in a competition for creating new Networks of Centres of Excellence. Phase II supports leading-edge research to create new economic opportunities: this is of strategic economic importance to Canada.

Progress and plans

- The technology development and demonstration initiative was frozen in the February 1995 federal budget, pending a Cabinet review of the government's support for technology development. Following this review, the government announced Technology Partnerships Canada on March 11, 1996. One component of the program focuses on environmental technologies.
- Technology Partnerships Canada (TPC) is a financially innovative partnership in which the private sector and the federal government share the risks and rewards of high technology investment in these areas: environment, enabling technologies, and aerospace and defence (including defence conversion). The objective of TPC is to help bring near-market products — specifically those with a high potential to stimulate economic growth and job creation — to the market by reducing the risk that is associated with the long lead times that precede technology commercialization.

The program will normally fund up to 25 to 30 percent of eligible costs associated with the project. In certain circumstances, the sharing ratio may reach up to 50 percent. On successful projects, the federal investment is repayable; moreover, the government will share in any upside returns.

Eligible recipients for support under the environmental technologies component include strategic alliances, joint ventures, or consortia operating in Canada. In certain circumstances, this includes individual Canadian companies which have the capability to commercially exploit the results of the research, development and demonstration projects.

Eligible activities include demonstration or development/demonstration projects in near-market and leading edge technologies that have not yet been commercially exploited.

Eligible projects will focus on priority areas such as clean process technologies, waste reduction and recycling, air and water pollution control, pollution prevention, water conservation, energy conservation and clean car technologies as they relate to the environment.

- A new Network of Centres of Excellence in Sustainable Forestry Management (SFM) was announced in December, 1995. One of the four research themes is to develop forest product processing techniques that are ecologically and socio-economically sound.

Initiative 4: Demonstrating Canadian Technology for the International Market

This initiative was designed to assist Canadian firms in demonstrating their environmental technologies, providing a springboard for first-time market entry into attractive global markets.

Progress and plans

- This technology demonstration initiative was also frozen in the February 1995 federal budget.
- The environmental technologies component of Technology Partnerships Canada will also support projects involving international collaboration in the development and/or international demonstration of Canadian environmental technologies with high export potential.

Initiative 5: Examination of the Certification of Products, Processes and Services

During the consultations preceding CEIS, the national certification of environmental products, processes and services was identified as an important factor in succeeding in domestic and export markets. The government, in partnership with the private sector, will examine options that would enable firms to compete more effectively at home and abroad through certification.

Progress and plans

- Workshops were held across Canada in 1995 to examine the concept with industry and government participants.
- A consensus emerged to focus on the verification of vendor performance claims for technologies and equipment-based services, rather than on certification. The inclusion of people-based services may be dealt with later.

- National consultations will be held in April 1996 to review a draft business plan for implementation, which includes possible funding.
- Depending on industry acceptance and program feasibility, a verification program could be introduced by April 1997.

Initiative 6: Domestic Market Development through Assistance for Small- and Medium-sized Enterprises to Improve Environmental Performance

This initiative is designed to augment the demand for environmental goods and services by raising the awareness of Canadian small- and medium-sized enterprises (SMEs) on the importance of environmental performance to their profitability and competitiveness.

Progress and plans

- A core group has been formed, comprising the Canadian Manufacturers' Association (CMA), the Canadian Standards Association (CSA), the Canadian Bankers Association (CBA), the Canadian Environment Industry Association (CEIA), the Centre patronal de l'environnement du Quebec, Industry Canada and Environment Canada to collaborate on the development and implementation of the initiative.
- Selected business champions, or "hubs", will be asked to encourage the SME they work with to consider adopting practices that reduce waste and material losses in their operations. These hubs will assist in selecting training materials appropriate to the needs of their SME suppliers and customers.
In 1995, both the CSA and CMA held "awareness building" workshops.

- Five pilot projects started in March 1996 to evaluate different training materials and approaches. These will be followed by assessments in May 1996 to plan the next steps. Projects include:
 - five workshops across Canada on a guide for SME to ISO 14000 implementation;
 - an initiative with businesses in the Niagara area will provide formal and on-site training in addition to a support network;
 - three workshops on environmental performance will be led by the Emery Creek Environmental Association (Ontario);
 - six workshops in Ontario to identify environmental and economic opportunities for new businesses are planned; and
 - environmental performance questions have been added to a pilot on management benchmarking for the Canadian environmental industry.

Improving Access to Domestic and Global Environmental Markets for Canadian Companies

Initiative 7: Improved Access to Business Opportunities through International Agreements and Institutions

Numerous business opportunities arise from global environmental conventions, from Canada's bilateral and multilateral agreements, as well as through the work of international institutions such as the World Bank and the United Nations. Canadian companies will be informed regularly about new international business opportunities and provided with assistance so they can obtain international sources of project financing. Action plans will be developed for individual conventions to identify specific initiatives involving the environmental industry. A major focus will be on projects with the potential for financing from the World Bank and other international financial institutions.

Progress and plans

- Important bilateral cooperation agreements and international conventions have been used to spur Canadian ventures abroad.
 - Canada–Poland: Four projects started or completed in waste management, wastewater, biogas facilities for farms, and hydro-electric projects.
 - Canada–Mexico: Five projects are in progress on laboratory accreditation, water quality, geographic information systems, contaminated sites, as well as a Globe 96 seminar.
 - Canada–Chile: Five initiatives are in progress relating to mining (norms and standards, environmental impact assessment and technology), forestry (international model forest), biodiversity, water management and economic instruments.

- Under the Biodiversity Convention, two successful trade fairs were conducted in the Bahamas (1994) and Indonesia (1995).
- Future initiatives include:
 - Inter-American Technology Cooperation Initiative. This is a two-year program comprising six roundtables in key industry sectors in various Latin American and Caribbean countries. It will focus on environmentally sound technologies and practices.
 - Under the International Climate Change Convention, a technology exhibit will be held July 8 to 19, 1996 in Geneva, Switzerland.
- A federal task force is developing a strategy for enhancing access by Canadian companies to projects sponsored by international financial institutions. Industry Canada and Environment Canada are co-chairing the work related to the environment sector.

Initiative 8: Establishing a National Statistical Database

There is a need for a statistical database on the environmental industry sector to provide comprehensive information about it. Better statistics and analysis will assist governments in future policy development, and will help both the industry and investors to benchmark policy performance. The statistical database will be created and maintained to meet the challenges of a growing and changing industry.

Progress and plans

- Statistics Canada has been working with the Organization for Economic Cooperation and Development and the Implementation Steering Committee for the Environmental Industry Strategy (Canada), to develop a definition of the environmental industry.

A stream of results from development work on the domestic market for environmental goods and services will begin in the summer of 1996. This will provide data on the sizes of markets for environmental goods and services by type; operation and capital expenditures by public and private sectors; research and development expenditures on environmental solutions; share of Canadian market by imports; in-house and purchased services; and permanent and contract employment.

- An industry supply-side survey should start in the fall of 1996, with early results available by mid-1997. The survey results will be combined with other data to describe the size and growth of the industry as well as its subsectors; export share of production; environmental revenues and employment; sectoral distribution of customers; research and development expenditures; company lists; location and employment sizes; destination of exports; country of control; financial characteristics of exporters; sources of financing; and contract employment.

Initiative 9: Supporting Strategic Alliances for Export Markets

This initiative is designed to encourage small- and medium-sized Canadian enterprises (SMEs) to strengthen their export performance by forming strategic alliances with other firms having complementary products and services. This will enable SMEs to offer total business solutions and have better access to export financing.

Progress and plans

- One new export consortium targetting the forest products market sector in South America has been approved and two more applications are under review. This is in addition to the three consortia formed under previous initiatives.

- Essential requirements for eligibility include:
 - a comprehensive business plan that includes a well-defined target market, a current presence in the market, a local office and representative(s), support of the trade posts in target markets, and coordination with other consortia;
 - five or more companies, mainly well-established Canadian SMEs with competitive technologies;
 - a consortium registered as a corporation with a formal shareholders' agreement; and
 - core funding of equity capital.
- The federal contribution is repayable, based on eligible expenses.

Initiative 10: Enhancing Environmental Market Intelligence

This initiative will help Canadian firms improve their assessment of domestic and international marketing opportunities by:

- *providing strategic information on both domestic and global markets;*
- *identifying and monitoring environmental trends, policies and initiatives to alert companies to emerging market opportunities;*
- *identifying key technologies, products and services that could have immediate applications, and marketing Canadian expertise aggressively in these areas;*
- *providing marketing workshops focussing on specific markets; and*
- *communicating environmental market information to Canadian companies on a regular basis.*

Progress and plans

- More than 35 Canadian international trade posts have marked the environment as a priority opportunity market sector.

- Environmental sector market reports have been recently issued for Thailand, Malaysia, Pakistan and India. These reports include assessments of market opportunities, the buyers and channels of distribution, and how to access the market. Each describe the supporting promotional activities at each post.
- New reports for 1996 will cover the emerging markets in Argentina, Brazil, Chile and Turkey.
- To raise awareness about the capabilities of Canada's environmental industry, Industry Canada has developed *Canadian Environmental Solutions* (CES), an award-winning, multimedia tool that is available on CD-ROM and diskettes, and soon on the Internet. CES is being used in Canada and abroad to inform prospective clients that there are almost 700 Canadian companies that can offer over 1,500 solutions to more than 1,000 environmental problems.
- Industry Canada also operates ENV-I-NET, a toll-free bulletin board service that provides companies with up-to-date information on a wide range of environment-related information, including projects being funded by international financial institutions, domestic and international market intelligence, research and development, etc. ENV-I-NET can be accessed at 1-800-507-7456 and will soon be available on the Internet.

Initiative 11: Promoting Exports through the International Transfer of Environmental Expertise

The primary objective of this initiative is to promote Canada's environmental industry by encouraging the government-to-government transfer of expertise on environmental management infrastructure. Canada's wealth of expertise relating to regulations, policies and technical programs in the public and private sectors will be utilized, along with the participation of educational institutions, to support the export of Canadian products and services. At the same time, the initiative will contribute solidly to the environmental management capacity of developing countries.

Progress and plans

- In March 1995, the International Environmental Management Initiative (IEMI) was launched as the core delivery program for this initiative. Seventeen projects have been approved for funding support. These include:
 - an environmental auditing program with the government of Thailand;
 - an energy efficiency workshop in Poland;
 - environmental assessment and remediation work in Latvia;
 - an air quality implementation plan in cooperation with the government of Colombia;
 - development of a mobile emissions-testing facility in Mexico.
- The total cost of these projects was close to \$3 million. The IEMI portion of the funding was approximately \$415,000 and the balance was provided by the private sector and foreign governments.

- Funding for projects approved under IEMI is on a fiscal-year basis. Proposals are now being considered and must be submitted to, and/or sponsored by, federal government managers.

Decisions respecting the approval and financial support of projects will be made by July 1996.

Initiative 12: Environmental Industry Expertise in Embassies and International Organizations

Trade commissioners and Canadian representatives to international organizations will receive environmental training so they may be better equipped to promote Canadian expertise and products.

Progress and plans

- The training needs were identified in consultation with the environment industry and Canada's trade officers. They include:
 - a basic understanding of environmental issues, technologies, and environmental regulations;
 - an analysis of markets, opportunities, market access strategies, local procurement practices, financing options and trade barriers; and
 - current and timely information on new Canadian products, services and innovative technological solutions. Industry information and promotional tools are to be available at trade posts.
- In March 1996, initial course modules were delivered in Canada to 29 trade representatives from posts abroad. Subsequent modules will be developed based on this experience.

- The second training session in June 1996 will focus on officers being posted abroad. This cycle will eventually capture those Canadians who have been appointed to international organizations. A third training session for trade representatives is planned for March 1997.

Initiative 13: Federal Government Commitment to Green Procurement

The federal government is the nation's largest commercial landlord and purchases more than \$9 billion annually in consumer, commercial and industrial goods. Through its procurement purchases it can act as a strong lever for remediation and restoration work, and can offer significant opportunities to help develop Canada's domestic market for environmental goods and services. The Greening Government Initiative commits federal departments to integrate environmental considerations into all aspects of its day-to-day operations, policies and programs. Greening federal procurement is a key element of this initiative.

Progress and plans

- Pursuant to amendments to the Auditor General Act, federal departments will report annually on progress relative to their sustainable development strategies, within which procurement practices will figure prominently.
- Green procurement training courses have been offered to federal employees in six regional locations across the country. A computer-based training program, the first of its kind anywhere, has been developed to assist employees who make purchasing decisions.

- During the past year, green procurement was a key component of a number of workshops such as, the Federal Fleet Forum (October 1995), the Environmental Issues Workshop (January 1996), and Globe 96 (March 1996). Scheduled for 1996 to 1997 are the Green Procurement Conference as part of the Metro Business Show (April), the annual Material Management Institute conference (May), and Greening Government Week (October). Others will be scheduled for later in 1996 to 1997.
- The EcoLogo displayed on products certified under the recently privatized Environmental Choice Program is being used increasingly by federal purchasers as a key procurement criterion.
- Progress has been made to make a variety of green procurement information available online, both through Environment Canada's Green Lane and through partnerships with various other private- and public-sector groups. It is anticipated that a comprehensive directory of green products will be available online in 1996.

Initiative 14: Government Practices Review

This initiative involves a review of federal government practices to examine their consistency with sustainable development objectives.

Progress and plans

- All department and agencies are conducting baseline reviews of existing policies and practices for which they are responsible.

Initiative 15: Enhancing the “Going Green” Building Program

This program implements, in collaboration with the private sector, a “Going Green” program linked to the Federal Building Initiative. Enhancing the “Going Green” Building program will help to improve the domestic market for environmental products and services by promoting the use of innovative technologies and processes for both existing and new federal facilities. At the same time, environmental management practices within the federal government will be enhanced.

Progress and plans

- Public Works and Government Services Canada (PWGSC) is utilizing three levels of priority for the environment:
 1. Developing department-wide environmental management systems, and ensuring that all health and safety requirements are met.
 2. Bringing all facilities up-to-date so that they meet regulated requirements.
 3. Focussing on environmental and energy initiatives that are cost-effective, and considering projects that have some environmental benefit but are not cost-effective.
- All PWGSC buildings have been scrutinized under these priorities and significant progress has been made in creating practical environmental solutions.

Initiative 16: Strengthening Participation in Development Assistance Programs

Government departments will examine and present options to strengthen the participation of environmental companies in Canadian development assistance programs, within the context of foreign policy objectives as established by the Foreign Policy Review.

Progress and plans

- The environment and environmental infrastructure are two of six priorities in Canadian development assistance programs.
- Increasing numbers of environment-related projects are being approved. For example, Canada's bilateral environment-related project funding increased from \$31 million in 1989 to 1990, to \$78 million in 1993 to 1994.
- The government has replenished one Consultant Trust Fund and is creating a second one to provide funding so that Canadian consultants can assist the World Bank in the initial stages of environment-related project work. Early involvement in these projects will help to position Canadian firms for significant downstream contracts.
- Canada–Romania: A petroleum sector training program on environmental management, in addition to a workshop on integrated resource planning and energy demand-side management, were undertaken under the auspices of a World Bank project, using Canadian development assistance funding.

Initiative 17: Increasing Awareness of Federal Export Support

Canadian companies can benefit from increased awareness of the services of the Canadian Commercial Corporation and other export financing organizations. These institutions work in partnership with environmental firms. They provide assistance at all phases of international procurement, including help with bidding on and negotiating contracts, securing beneficial payment terms, and contract management.

Progress and plans

- The Canadian Commercial Corporation and the Export Development Corporation are active participants in the Environmental Industry National Sector Team. The aim is to bring all federal and provincial players together to work with industry to improve international business development.

Initiative 18: Enhancing the Involvement of Members of Parliament

The objective of this initiative to involve the Members of Parliament more fully in activities related to international gatherings and missions. Their enhanced involvement will serve to confirm the commitment of the Government of Canada to the Canadian Environmental Industry Strategy (CEIS).

Progress and plans

The Deputy Prime Minister and former Minister of the Environment, Sheila Copps, led an environmental industry mission to Malaysia, Thailand, and South Korea from September 4 to 15, 1995. This was the first mission led by a Canadian Minister of the Environment, and included officials from 29 companies.

Benefits to the Canadian environmental industry included the signing of 14 agreements between Canadian business and local Asian interests. In addition, a Memorandum of Understanding on

Environmental Protection was signed with South Korea. Agreement was also reached with Thailand and Malaysia to identify and establish a joint implementation scheme under the framework of the Climate Change Convention to reduce greenhouse gas emissions.

Partnership with the Canadian Environmental Industry

A cornerstone of the Canadian Environmental Industry Strategy (CEIS) is the active involvement of the Canadian environmental industry itself, which is both a key stakeholder and partner in the implementation of this core strategy.

Initiative 19: Establishing an Implementation Steering Committee

A steering committee is needed to implement CEIS and to report annually upon its progress to the Ministers of Industry and Environment. The committee will include federal departments and agencies, as well as representative from the Canadian environmental industry and related organizations, plus various environmental councils.

Progress and plans

- The Implementation Steering Committee for the CEIS consists of 14 members, comprised of representatives from the following organizations:
 - Canadian Environmental Industry Association and three member companies (4 in total)
 - Canadian Environmental Technology Centres (3 in total)
 - Canadian Council for Human Resources in the Environment Industry
 - Canadian Council of Ministers of the Environment
 - Environment Canada (co-chair)

- Industry Canada (co-chair)
 - Department of Foreign Affairs and International Trade
 - Public Works and Government Services Canada
 - Canadian International Development Agency
- The Committee advises the government on industry priorities, provides ongoing feedback on the implementation of CEIS, shares intelligence on new opportunities for growth and development, and evaluates the annual progress under the strategy. The first two meetings were held in September and December of 1995. The next meeting will be held in April 1996.

Initiative 20: Establishing a Sector Advisory Group for International Trade

A Sector Advisory Group for International Trade (SAGIT) will be established to review policies and priorities as well as make specific recommendations to help Canadian firms win significant export contracts in targetted global markets.

Progress and plans

- The framework for committee operations is completed.
- The Ministers of Industry and International Trade are establishing the Environmental Products and Services SAGIT.
- The first official meeting of this SAGIT will be scheduled for April-May, 1996.

Initiative 21: Representation on Environmental Advisory Committees

To ensure the environmental industry is represented on environmental protection advisory committees, a representative of the environmental industry will be invited to be a full member of the federal Advisory Committee on Environmental Protection.

Progress and plans

- Due to budgetary considerations, the federal Advisory Committee on Environmental Protection has been terminated.

Initiative 22: Strengthening Chapters of Environmental Industry Associations

Chapters of environmental industry associations will be strengthened to enable them to represent their member companies more effectively.

Progress and plans

- Assistance was provided to support the ongoing work of la grappe industriel du Quebec.
- The Canadian Environment Industry Association (CEIA) is preparing a comprehensive strategy for strengthening provincial and national environment industry associations.
- CEIA has received support for the development of a communications network linking CEIA National and its provincial chapters to their members and other key stakeholders.

The above initiatives, as well as the partnership of the environmental industry, constitute the core elements of the Canadian Environmental Industry Strategy. The Strategy will complement and help focus already-existing programs, in addition to furthering initiatives by a number of federal departments and regional agencies that support the environmental industry.

CONCLUSION

A dynamic and vibrant environmental industry is key to the future prosperity of Canada's economy and its environment. Under the Canadian Environmental Industry Strategy, progress is being made to ensure that Canada's environmental industry will thrive in the rapidly growing domestic and international markets for its goods and services.