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ANNEX

INDUSTRY ASSOCIATIONS IN CANADA:

**WORKING TOGETHER
TO GROW AN INNOVATIVE ECONOMY**

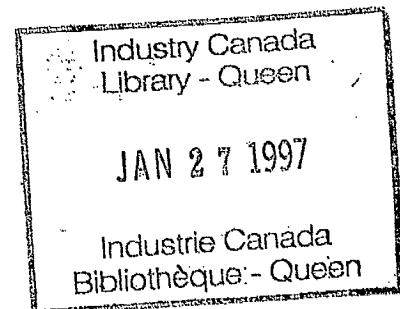
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INDUSTRY ASSOCIATIONS IN CANADA:

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ANNEX

- I. LIST OF ASSOCIATIONS THAT PARTICIPATED IN SURVEY AND INTERVIEWS
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ANNEX I. LIST OF ASSOCIATIONS THAT PARTICIPATED
IN SURVEY AND INTERVIEWS

A. ASSOCIATIONS THAT WERE INTERVIEWED

1. Aerospace Industries Association of Canada
2. Alberta Aerospace Association
- * 3. Association des manufacturiers du Québec
4. Association of Consulting Engineers of Canada
5. Atlantic Provinces Chamber of Commerce
- * 6. Automotive Industries Association of Canada
- * 7. Automotive Parts Manufacturers' Association
- * 8. Business Council of British Columbia
9. Business Council on National Issues
10. Canadian Advanced Technology Association
11. Canadian Apparel Federation
- * 12. Canadian Association of Petroleum Producers
13. Canadian Bankers' Association
14. Canadian Chamber of Commerce
- * 15. Canadian Chemical Producers' Association
16. Canadian Construction Association
17. Canadian Council of Professional Engineers
18. Canadian Drug Manufacturers' Association
- * 19. Canadian Exporters' Association
20. Canadian Federation of Independent Business
- * 21. Canadian Federation of Independent Grocers
- * 22. Canadian Foundry Association
23. Canadian Franchise Association
24. Canadian Home Builders' Association
- * 25. Canadian Institute of Chartered Accountants
26. Canadian Life and Health Insurance Association
27. Canadian Manufacturers' Association
28. Canadian Manufacturers' Association (B.C. Division)
29. Canadian Office Products Association
- * 30. Canadian Restaurant and Foodservices Association
- * 31. Canadian Textiles Institute
- * 32. Canadian Urban Transit Association
33. Chambre de commerce de Montréal
- * 34. Conseil du patronat du Québec
35. Council of Forest Industries of B.C.
36. Electrical & Electronics Manufacturers' Assoc. of Canada
- * 37. Environmental Services Association of Alberta
- * 38. Geomatics Industry Association of Canada
39. Grocery Products Manufacturers' of Canada
- * 40. Industrial Biotechnology Association of Canada
- * 41. Information Technology Association of Canada
- * 42. Insurance Bureau of Canada
- * 43. Investment Dealers Association of Canada
- * 44. Machinery and Equipment Manufacturers' Assoc. of Canada
- * 45. Mining Association of Canada
46. Ontario Furniture Manufacturers' Association
47. Ontario Waste Management Association

- * 48. Petroleum Services Association of Canada
 - * 49. Pharmaceutical Manufacturers' Association of Canada
 - * 50. Prairie Implement Manufacturers' Association
 - * 51. Retail Council of Canada
 - * 52. Rubber Association of Canada
 - 53. Society of the Plastics Industry of Canada
 - * 54. Software Development Association of Saskatchewan
 - 55. Software Industry Association of Nova Scotia
 - 56. Tourism Industry Association of Nova Scotia
 - * 57. Trust Companies Association of Canada
- * = Returned "Basic Information Annex" (29).

B. ASSOCIATIONS THAT RESPONDED TO THE SURVEY

1. Alberta Forest Products Association
2. Alliance of Canadian Travel Associations
3. Association de l'industrie de l'aluminium
4. Association des fabricants de meubles du Québec
5. Association des manufacturiers de bois de sciage du Qué.
6. Association des manufacturiers de prod. alimentaires du Qué.
7. Association of Canadian Publishers
8. Association of Consulting Engineers of Saskatchewan
9. B.C. Wood Specialties Group Association
10. Business and Institutional Furniture Mfrs. Assoc. of Canada
11. Canadian Association of Railway Suppliers
12. Canadian Association of Recycling Industries
13. Canadian Business Telecommunications Alliance
14. Canadian Electrical Association
15. Canadian Hardware and Housewares Manufacturers' Assoc.
16. Canadian Heat Exchanger and Vessel Manufacturers' Assoc.
17. Canadian Industrial Transportation League
18. Canadian Institute of Biotechnology
19. Canadian Maritime Industries Association
20. Canadian Paint and Coatings Association
21. Canadian Paper Box Manufacturers' Association
22. Canadian Paper Trade Association
23. Canadian Retail Hardware Association
24. Canadian Tooling Manufacturers' Association
25. Canadian Transportation Equipment Association
26. Canadian Wood Council
27. Centre d'initiative technologique de Montréal
28. Consulting Engineers of British Columbia
29. Electric Vehicle Association of Canada
30. Fédération de l'automatisation au Québec
31. Fur Council of Canada
32. Furniture West
33. Medical Devices Canada
34. Motor Vehicle Manufacturers' Association
35. Nova Scotia Consulting Engineers Association
36. Office des congrès et du tourisme du Grand Montréal
37. Packaging Association of Canada
38. Saskatchewan Mining Association
39. Shoe Manufacturers' Association of Canada
40. Society of Management Accountants of Canada
41. Structural Board Association
42. Technology Industries Association of B.C.
43. Tourism Industry Association of Saskatchewan

C. ASSOCIATIONS THAT DID NOT REPLY

1. Air and Waste Management Association
2. Air Transport Association of Canada
3. Alberta Design Works
4. Alberta Plastic Recyclers Association
5. Association cdn. pour les structures et matériaux composites
6. Association des agents de voyages du Québec
7. Association des brasseurs du Québec
8. Association des embouteilleurs de boissons gazeuses du Québec
9. Association des entrepreneurs de services en envir. du Québec
10. Association des hôteliers de la province de Québec
11. Association des hôteliers du Grand Montréal
12. Association des industries forestières du Québec
13. Association des ingénieurs-conseils
14. Association des maisons de commerce extérieur du Québec
15. Association des manufacturiers de maçonnerie de béton
16. Association des restaurateurs du Québec
17. Association des stations de ski du Québec
18. Association of International Automobile Mfrs. of Canada
19. Association professionnelle des designers de mode du Québec
20. Association prov. des constructeurs d'habitations du Qué.
21. Association québécoise de la maîtrise de l'énergie
22. Association québécoise des fabricants de l'industrie médicale
23. Association québécoise des techniques de l'eau
24. Atlantic Canada Environmental Trade Association
25. B.C. and Yukon Hotels' Association
26. B.C. Apparel Manufacturers' Association
27. B.C. Biotechnology Alliance
28. B.C. Construction Association
29. B.C. Salmon Farmers' Association
30. British Columbia Chamber of Commerce
31. Building Owners' and Managers' Association of Montreal
32. Canadian Association of Japanese Automobile Dealers (*)
33. Canadian Association of Logistics Management
34. Canadian Association of Moldmakers
35. Canadian Boiler Society
36. Canadian Carpet Institute
37. Canadian Council of Grocery Distributors
38. Canadian Environment Industry Association
39. Canadian Environment Industry Association (B.C. Chapter)
40. Canadian Federation of Independent Business (B.C. Chapter)
41. Canadian Fertilizer Institute
42. Canadian Fluid Power Association
43. Canadian International Freight Forwarders' Association
44. Canadian Lumbermen's Association
45. Canadian Magazine Publishers' Association
46. Canadian Manufactured Housing Institute
47. Canadian Marine Manufacturers' Association
48. Canadian Marine Trades Federation
49. Canadian National Aboriginal Tourism Association
50. Canadian Nuclear Association
51. Canadian Printing Industries Association
52. Canadian Professional Logistics Institute

53. Canadian Pulp and Paper Association
54. Canadian Sporting Goods Association
55. Canadian Steel Producers' Association
56. Canadian Trucking Association
57. Canadian Wholesale Drug Association
58. Certified General Accountants Association of Canada
59. CITEQ - Biotechnologie
60. Conseil de l'industrie de l'hydrogène
61. Conseil des bio-industries environnementales
62. Construction Association of Nova Scotia
63. Electronics Industry Association of Alberta
64. Federation of Automobile Dealer Associations of Canada
65. Footwear Council of Canada
66. Groupement québécois d'entreprises
67. Heating, Refrigerating and Air Conditioning Inst. of Cda.
68. Hotel Association of Canada
69. Institut canadien de l'immeuble
70. Institute of Certified Management Consultants of Canada
71. Japan Automobile Manufacturers Association
72. Mining Association of B.C.
73. N.B. Forest Products Association
74. National Ski Industries Association
75. Newfoundland Ocean Industries Association
76. Nova Knowledge
77. Ontario Forest Industries Association
78. Ontario Lumber Manufacturers' Association
79. Ordre des architectes du Québec
80. Ordre des chimistes du Québec
81. Paper and Paperboard Packaging Environmental Council
82. Railway Association of Canada
83. Réseau de capital de risque du Québec
84. Royal Architectural Institute of Canada
85. Saskatchewan Advanced Technology Management Association
86. Saskatchewan Architects Association
87. Saskatchewan Forestry Association
88. Société des industries du plastique du Québec
89. Software Alberta Society
90. Software N.B.
91. Tourism Industry Association of Canada
92. Tourism Ontario
93. Transportation Association of Canada

Note: (*) The Canadian Association of Japanese Automobile Dealers returned the survey questionnaire but it was received too late to be included in the analysis of the results.

ANNEX II. DATES AND PLACES OF PERSONAL INTERVIEWS
WITH INDUSTRY ASSOCIATION EXECUTIVES

Name of Association	Date (1993)	City
1. Aerospace Industries Association of Canada	July 6	Ottawa
2. Alberta Aerospace Association	September 13	Edmonton
3. Association des manufacturiers du Québec	September 21	Montreal
4. Association of Consulting Engineers of Canada	July 5	Ottawa
5. Atlantic Provinces Chamber of Commerce	September 30	Toronto
6. Automotive Industries Association of Canada	June 18	Ottawa
7. Automotive Parts Manufacturers' Association	July 7	Toronto
8. Business Council of British Columbia	June 22	Vancouver
9. Business Council on National Issues	June 14	Ottawa
10. Canadian Advanced Technology Association	July 5	Ottawa
11. Canadian Apparel Federation	June 21	Ottawa
12. Canadian Association of Petroleum Producers	September 15	Calgary
13. Canadian Bankers' Association	July 6	Ottawa
14. Canadian Chamber of Commerce	June 14	Ottawa
15. Canadian Chemical Producers' Association	September 3	Ottawa
16. Canadian Construction Association	July 6	Ottawa
17. Canadian Council of Professional Engineers	June 21	Ottawa
18. Canadian Drug Manufacturers' Association	September 27	Toronto
19. Canadian Exporters' Association	July 20	Ottawa
20. Canadian Federation of Independent Business	June 15	Toronto

Name of Association	Date (1993)	City
21. Canadian Federation of Independent Grocers	September 29	Toronto
22. Canadian Foundry Association	June 18	Ottawa
23. Canadian Franchise Association	September 27	Toronto
24. Canadian Home Builders' Association	July 5	Ottawa
25. Canadian Institute of Chartered Accountants	July 8	Toronto
26. Canadian Life and Health Insurance Association	July 7	Toronto
27. Canadian Manufacturers' Association	June 15	Toronto
28. Canadian Manufacturers' Association (B.C. Division)	June 22	Vancouver
29. Canadian Office Products Association	September 30	Toronto
30. Canadian Restaurant and Foodservices Association	June 24	Toronto
31. Canadian Textiles Institute	July 6	Ottawa
32. Canadian Urban Transit Association	July 7	Toronto
33. Chambre de commerce de Montréal	September 20	Montreal
34. Conseil du patronat du Québec	September 21	Montreal
35. Council of Forest Industries of B.C.	June 22	Vancouver
36. Electrical & Electronics Manufacturers' Assoc. of Can.	July 9	Toronto
37. Environmental Services Association of Alberta	September 13	Edmonton
38. Geomatics Industry Association of Canada	September 9	Ottawa
39. Grocery Products Manufacturers of Canada	September 8	Ottawa
40. Industrial Biotechnology Association of Canada	October 4	Ottawa
41. Information Technology Association of Canada	July 9	Toronto
42. Insurance Bureau of Canada	June 24	Toronto
43. Investment Dealers Association of Canada	September 28	Toronto
44. Machinery and Equipment Manufacturers' Assoc. of Can.	June 21	Ottawa
45. Mining Association of Canada	June 18	Ottawa

Name of Association	Date (1993)	City
46. Ontario Furniture Manufacturers' Association	September 30	Toronto
47. Ontario Waste Management Association	September 27	Toronto
48. Petroleum Services Association of Canada	September 15	Calgary
49. Pharmaceutical Manufacturers' Association of Canada	October 7	Ottawa
50. Prairie Implement Manufacturers' Association	September 16	Regina
51. Retail Council of Canada	June 24	Toronto
52. Rubber Association of Canada	September 29	Toronto
53. Society of the Plastics Industry of Canada	July 8	Toronto
54. Software Development Association of Saskatchewan	September 17	Saskatoon
55. Software Industry Association of Nova Scotia	June 16	Halifax
56. Tourism Industry Association of Nova Scotia	June 16	Halifax
57. Trust Companies Association of Canada	September 8	Ottawa

ANNEX III. DATES, PLACES AND PARTICIPANTS IN FOCUS GROUPS

COMPANY NAME

SECTOR

 Halifax-1
 June 17, 1993

- * Atlantic Canada Environmental Trade Association
- * Biotechnology Working Group
- * Canadian Manufacturers' Association (N.S. Division)
- * Construction Association of Nova Scotia
- * Halifax Board of Trade
- * NovaKnowledge
- * Nova Scotia Consulting Engineers Association
- * Nova Scotia Advanced Technology Collegium

Halifax-2
 June 17, 1993

- | | |
|---------------------------------|---------------|
| 1. ARA Consulting Group Inc. | Services |
| 2. CISD International | Services |
| 3. Fenix Software | Technology |
| 4. Fenwick Laboratories Limited | Technology |
| 5. Lahave Research Incorporated | Technology |
| 6. National Sea Products Ltd. | Manufacturing |
| 7. Precision Biologicals | Technology |
| 8. Prince George Hotel | Tourism |
| 9. Seimaç Limited | Services |
| 10. STD Technology Inc. | Technology |
| 11. Thackeray's | Tourism |

Vancouver
 June 23, 1993

- | | |
|--|---------------|
| 12. Canadian Forest Products Ltd. | Manufacturing |
| 13. Canterbury Coffee Corporation | Services |
| 14. Columbia Plastics Ltd. | Manufacturing |
| 15. Cozine Fry Associates | Technology |
| 16. Crippen Consultants | Services |
| 17. Royal Bank | Services |
| 18. Weldwood of Canada Limited | Manufacturing |
| 19. WTM Westwood Technology Management | Technology |

COMPANY NAME

SECTOR

Toronto-1
June 25, 1993

20. A.G. Anderson	Manufacturing
21. CardioMed Supplies Inc.	Manufacturing
22. Crowe Foundry Limited	Manufacturing
23. EST Design	Services
24. Furniture Technology	Services
25. Lennox Industries (Canada) Ltd.	Manufacturing
26. Neelon Casting Ltd.	Manufacturing
27. The Global Group	Manufacturing

Edmonton
September 14, 1993

28. Associated Health Systems Inc.	Services
29. Inventronics Limited	Manufacturing
30. Kendallure Ltd.	Manufacturing
31. Lone Pine Publishing	Services
32. Prairie Biological Research Ltd.	Technology
33. Protective Apparel Inc.	Manufacturing
34. Technology Brokers Inc.	Technology

Calgary
September 16, 1993

35. ACTC Technologies Inc.	Technology
36. Foothills Plastic (1990) Inc.	Manufacturing
37. Kids Only Clothing Club Inc.	Manufacturing
38. Nose Creek Forest Products Ltd.	Manufacturing
39. Wyvern Group	Manufacturing

COMPANY NAME

SECTOR

Saskatoon
September 17, 1993

40. Dacobusy Software Systems	Technology
41. Develcon Electronics Ltd.	Technology
42. Display Systems International Inc.	Technology
43. Dutch Industries Ltd.	Manufacturing
44. High-Line Mfg. Inc.	Manufacturing
45. MBR MicroBio RhizoGen Corporation	Technology
46. Nu-Fab Building Products Ltd.	Manufacturing
47. PhilomBios	Technology
48. Saskatoon Fresh Pack Potatoes Ltd.	Manufacturing
49. Saskatoon Chemicals Ltd.	Manufacturing
50. Sci-Tec Instruments Inc.	Manufacturing
51. Scientific Instrumentation Limited	Technology

Montreal-1
September 21, 1993

52. Alcatel Cables	Manufacturing
53. Daignault Rolland & Cie Ltée	Manufacturing
54. Hano Métal Ltée	Manufacturing
55. Remo Construction Inc.	Construction
56. Secant	Construction
57. Segitel Inc.	Services

- * Assoc. des maisons de commerce du Québec
- * Assoc. des stations de ski du Québec
- * Centre d'adapt. de la m-d'oeuvre aéro. au Québec
- * Centre patronal de l'environnement du Québec
- * Fédération de l'automatisation au Québec

Montreal-2
September 22, 1993

- * Michel Tremblay & associée enr. (CSAE)
- * La Société des industries du plastique du Canada
- * Off. des congrès et du tourisme du Grand Montréal
- * Assoc. des manufacturiers de chaussures du Canada

COMPANY NAME

SECTOR

Moncton
September 23, 1993

58. Atlantic Pressure Treating Ltd.	Manufacturing
59. Champlain Inn Motel	Tourism
60. Crandall Engineering Ltd.	Services
61. Datacor/ISM Atlantic Inc.	Technology
62. Fabcon Ltd.	Services
63. Fundy Computer Services Limited	Technology
64. Jacques Whitford Environment Limited	Services
65. Ponderosa Steakhouse	Tourism

* New Brunswick Sub-Licensee Forestry Alliance

Toronto-2
September 28, 1993

- * Canadian Booksellers Association
- * Canadian Electrical Distributors Association
- * Canadian Retail Hardware Association (2)
- * Canadian Standards Association
- * Canadian Urban Transit Association
- * Council of Ontario Construction Associations
- * Information Technology Association of Canada
- * Motor Vehicle Manufacturers' Association
- * Motorcycle & Moped Industry Council
- * School Bus Operators' Association of Ontario

* = Association

FOCUS GROUP PARTICIPANTS
BREAKDOWN BY SECTOR

SECTOR	NUMBER	PERCENT
Manufacturing & Processing	27	42
Services	14	22
Construction	2	3
Tourism	4	6
Technology	18	28
Total	65	100

FOCUS GROUP PARTICIPANTS
BREAKDOWN BY REGION

REGION	NUMBER	PERCENT
Atlantic	19	29
Québec	6	9
Ontario	8	12
West	32	49
Total	65	100

ANNEX IV. MOU's BETWEEN THE DEPARTMENT (ex-ISTC)
AND INDUSTRY ASSOCIATIONS IN CANADA

Name of Association	Date Signed	Term of Mou
Aerospace Industries Association of Canada	15APR91	5 Years
Association of Consulting Engineers of Canada	29MAY89	5 Years
Automotive Parts Manufacturers' Association of Canada	26APR89	5 Years
Canadian Council of Furniture Manufacturers	30OCT85	Not defined
Canadian Council of Professional Engineers	30MAY90	Not defined
Canadian Defence Preparedness Association	19NOV90	5 Years
Canadian Sporting Goods Association	21NOV85	Not defined
Canadian Urban Transit Association	12DEC89	5 Years
Machinery & Equipment Manufacturers' Assoc. of Can.	10OCT90	5 Years
Medical Devices Canada	01NOV88	Not defined
Prairie Implement Manufacturers' Association	23JUN89	5 Years
Society of the Plastics Industry of Canada	11NOV88	5 Years

Notes:
(1) MOU = Memorandum of Understanding.
(2) Based on the Corporate Secretary's records.

**ANNEX V. FINANCIAL CONTRIBUTIONS BY THE DEPARTMENT (ex-ISTC)
TO INDUSTRY ASSOCIATIONS IN CANADA**

The following table is a summary of expenditures by the department (ex-ISTC) to Canadian industry associations during the fiscal year 1992-93. It is based on information in the department's RAMS financial system.

CATEGORY OF EXPENDITURE	AMOUNT (\$ M)	PERCENT OF TOTAL
Sector Campaigns	4.1	75
Tourism	0.2	4
Other Program Expenditures	0.8	14
Sub-Total Program Expend.	5.1	93
Consulting Fees	0.2	4
Purchases of Goods & Services	0.2	3
TOTAL	5.5	100

FY 1992-93 was chosen because it was the most recent, complete financial year. It was not feasible to do a similar analysis for previous years. In FY 1992-93 the department paid out five and one-half million dollars to industry associations in Canada. About three-quarters of this amount (over \$4.1 million) was through the Sector Campaigns program; the major share went to the Council of Forest Industries of B.C. and to the Canadian Pulp and Paper Association. Another 18% (almost \$1 million) was for other program expenditures, including, among others, the Canada-Nova Scotia Tourism Development Agreement, and the TOP and AMTAP programs.

The remaining seven percent was spent on consulting fees (about \$215,000) and purchases of goods and services (about \$190,000). It should be noted that the "Consulting Fees" category includes payments to industry associations for consulting services, but it does not include amounts paid directly to consulting firms for work that may have been done on behalf of associations. The "Purchases of Goods and Services" category comprises, among others, expenditures to industry associations for membership and registration fees, books and publications, subscriptions, software packages, seminars and conferences, and training services.

Another \$1.2 million (not included in the above table) were paid to industry associations in FY 1992-93 through the PEMD-SA program, which is administered in the department. PEMD-SA, or Program for Export Market Development (Special Activities), is a program of the Department of Foreign Affairs and International Trade.

