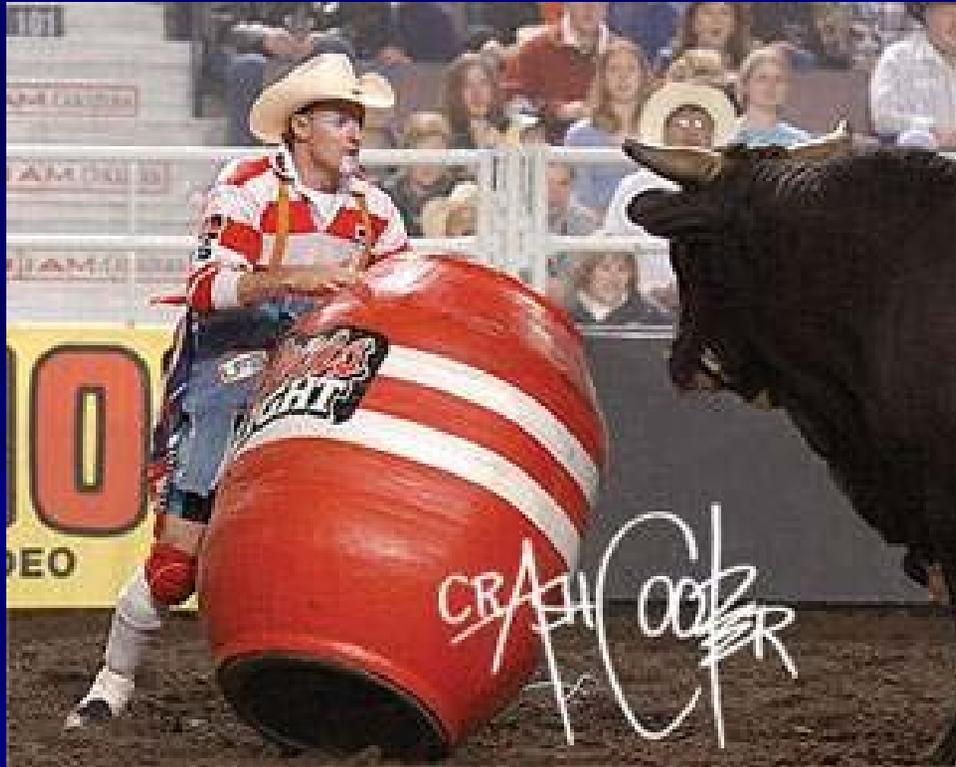


MAKE THE CONNECTION

FINANCE AND BUSINESS SUPPORT

Glenn MacDonell
Director, Environmental Industries
Industry Canada
October 15th, 2008



TAKING THE BULL BY THE HORNS
Nothing worth doing comes easy

PRESENTATION

- Canada's Environment Industry
- Funding Technologies for the Environment
- Partnering as a development strategy

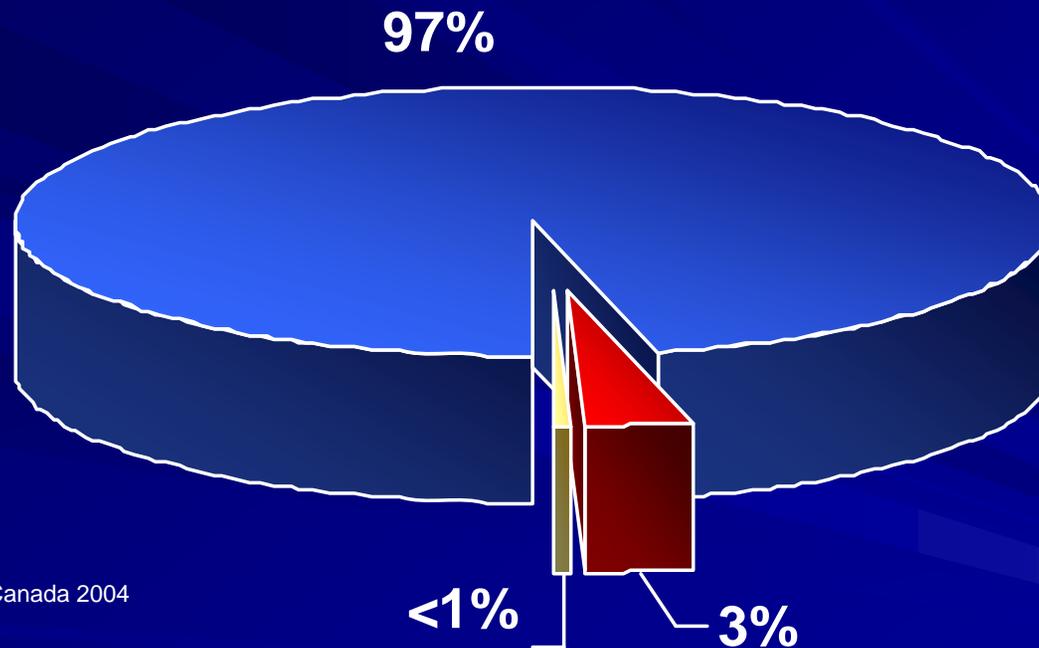
Canada's Environment Industry

- 8 500 environmental firms in 2004
- 251 000 total employment
- C\$18.5 billion total environmental revenues
- C\$29 billion market in Canada

Growth of Canada's Environment Industry (2002 to 2004)

- Sales grew by 17% to reach \$18.5 B led by:
 - Waste management & remediation services: +13%
 - Environmental consulting: +25%
 - Wholesale trade (mostly recyclables): +16%
 - Goods & services to reduce GHG emissions: + 24%
- Total exports: grew by 9.4% to reach 1.5B and represent 8% of total revenue

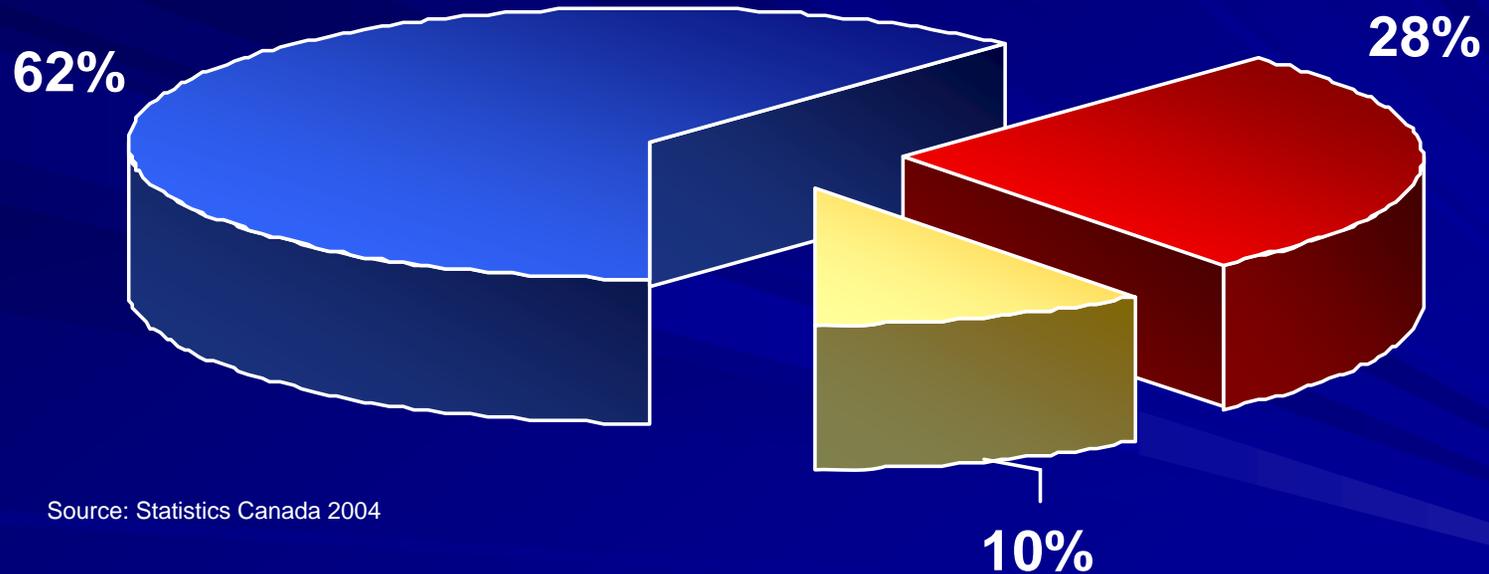
Establishment Size by Employees



Source: Statistics Canada 2004



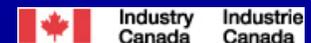
Revenues by Establishment Size



Source: Statistics Canada 2004

■ < 100 ■ 100 to 499 ■ 500 or more

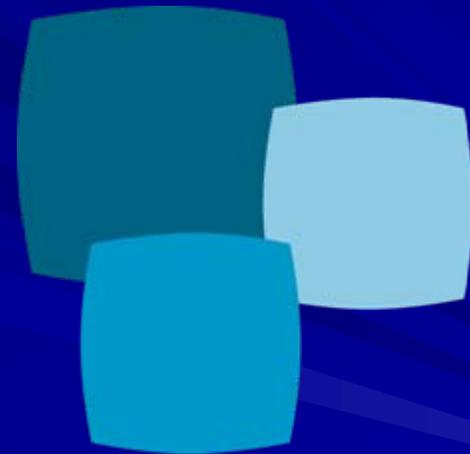
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Funding Technologies for the Environment (FTE)

“Funding sources at your fingertips”

[Http://www.ic.gc.ca/fundtech](http://www.ic.gc.ca/fundtech)



CAPABILITIES

Traditional search by keyword or alphabetical listing.

Advanced search to target programs by province.

The screenshot displays the Industry Canada website interface. At the top, there are logos for Industry Canada and the Government of Canada. The main navigation bar includes links for Français, Home, Contact Us, Help, Search, and canada.gc.ca. The page title is "Funding Technologies for the Environment".

The left sidebar contains a menu with the following items: Industry Canada, Programs and Services, Funding Technologies for the Environment, Home, Browse Programs Alphabetically, and Proactive Disclosure.

The main content area is titled "Funding Technologies for the Environment" and features a yellow banner with the text: "Find programs that fund innovative technology solutions for the Canadian environment." Below this is a search section titled "Search our program database" with a "Keyword(s):" input field, a "Find results with:" dropdown menu set to "Any of these words:", and a "Limit number of results to:" dropdown menu set to "25". There are "Search" and "Reset" buttons.

A note below the search section states: "Note: This search is limited to Funding Technologies for the Environment only. To search the entire Industry Canada website, use the [Site Search](#)." Below this is a section titled "Browse our program listings Alphabetically:" with a grid of letters from A to Z, each with a corresponding link.

At the bottom of the main content area, it says: "If you would like to suggest a program to add to this website, please contact [Pamela Hunt](#)."

The right sidebar contains an "Industry Canada Feature" section with a "March is [Health](#) Prevention Month" banner. Below this is a "Stay informed" section with a link to "Receive newsletters and email updates." and a "Benefits of this website to technology developers and industry:" section with a bulleted list:

- Up-to-date, comprehensive records
- Streamlined application process
- User-friendly site navigation
- Increased knowledge of complementary opportunities

MAKE THE CONNECTION
Finance and Business Support

FUND DETAILS

- Fund name
- Objective
- Geographic focus
- Eligible recipients
- Fund size, duration
- Target technology
- Target activities
- Funding limits
- Repayment terms
- Application cycle
- Custodian website

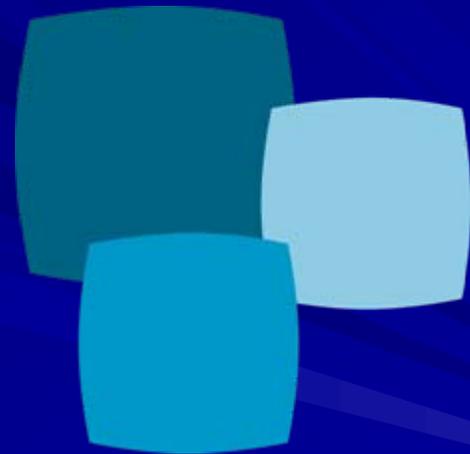
Industry Canada	Funding Technologies for the Environment
Programs and Services	ecoENERGY Retrofit program - Natural Resources Canada (NRCan)
Funding Technologies for the Environment	Objectives
Home	Natural Resources Canada's (NRCan's) ecoENERGY Retrofit program provides financial support to homeowners, small and medium-sized businesses, public institutions and industrial facilities to help them implement energy saving projects that reduce energy-related greenhouse gases (GHGs) and air pollution, thereby contributing to a cleaner environment for all Canadians.
Browse Programs Alphabetically	Eligible Region(s)
Proactive Disclosure	Canada
	Eligible Recipients
	Not-For-Profit Organization Private Company or Individual Universities and Colleges Other (homeowner)
	Overall Fund Size
	Depends on the individual applying.
	Fund Duration
	April 1, 2007 to March 31, 2011.
	Target Technology Area(s)
	Energy efficient building retrofits.
	Eligible Activities
	Energy saving projects that reduce energy-related greenhouse gases (GHGs) and air pollution.
	Funding Limits
	<ul style="list-style-type: none">• For homeowners: \$5,000.• For owners of small and medium-sized buildings in the commercial and institutional sectors: Up to 25% of eligible project costs to a maximum of \$50,000.

PROPOSALS

- Clearly written and focused
- Closely follow application instructions
- Exhibit an understanding of funding agency priorities
- Illustrate the strengths of the applicant
- Describe the methodology in detail
- Clarify roles and responsibilities
- Describe anticipated outcomes
- Include a budget and business case

Funding Technologies for the Environment (FTE)

[Http://www.ic.gc.ca/fundtech](http://www.ic.gc.ca/fundtech)



PARTNERING

“...the ability of Canadian companies to be competitive will be determined by their ability to provide integrated solutions. This means developing partnerships and collaborations...”

~ *Aegis Management Consulting*
Environmental Industry Competitive Analysis

BENEFITS

- Can lead to new products or services
- Potential for marketable turnkey solutions
- Reduces costs through shared inputs
- Turn competitors into collaborators
- Increases competitive market advantage
- Increases ability to bid on larger projects
- Helps manage skill shortages

SUCCESS FACTORS

- **Collaboration Agreement:** A detailed business plan with patent protections and stakeholder consultation procedures.
- **Shared Leadership:** Should be scheduled to rotate consistently and include a back up.
- **A High Level of Trust:** Establish a dispute resolution mechanism and have financial histories vetted by an agreed upon third party.

RELATIONSHIP BUILDING

- Conferences and networking events
- Business match-making forums
- Local Chambers of Commerce
- Centers of Excellence
- Sectoral and regional associations
- Trade commissioner's service
- Consultation services

Canada 