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INFORMATION AND COMMUNICATIONS TECHNOLOGY COUNCIL



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ANNUAL REPORT





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MESSAGE FROM THE CHAIR

This year marks the end of my six years as the Chair of ICTC. A remarkable time and a journey of growth, strength, and measurable successes for an organization that now celebrates 26 years of existence in an era of remarkable technological advancements.

Last year, Canada's economy continued to be reshaped by the advent of the Internet of Things' (IoT)', collaborative and open approaches, and a growing demand for instantaneous and unfettered exchange of value that is anchored in trust. Recent advancements in blockchain, artificial intelligence, additive manufacturing, and virtual & augmented reality continue to spur rapid business transformation, and new market economies and heighten the demand for skilled talent in a tight labour market. The accelerated wave of business transformation, however, came against a backdrop of changing consumer habits and expectations and fierce global market competition. While many Canadian companies are now "born global", digital adoption and business scale-up remain a challenge for small and micro enterprises.

In 2017, the jobless rate for ICT workers was at a record low of 2.6%, leading to a job growth that outpaced the overall economy by 6 to 1. While these are signs of a vibrant digital economy, an aging ICT workforce, disproportionate representation and gender imbalance, as well as the of rise of free-lance and fractional employment are all signs of a new labour market paradigm.

ICTC's Outlook 2021 report "The Next Talent Wave - Navigating The Digital Shift" highlighted an acute digital talent demand of around 216,000 by 2021. Addressing this challenge with particular focus on Canada's youth will be pivotal for the next number of years. Recently announced federal government programmes such as CanCode in K-12 and SWILP for PSEs are all concrete measures in the right direction that leverage the full potential of our renowned academic system and industry engagement.

In closing, we have been privileged along

the years to have the unwavering support of our industry, associations, policy makers, and academic partners from across Canada. Our journey is just beginning, and we endeavour as an organization to continue to strengthen Canada's advantage in a global economy.

My sincere thanks to all ICTC board members for their commitment and insights, and to all the staff for their passion and leadership in advancing the goals of ICTC. As I leave the board, I wish all of you success as you guide ICTC into the future.

Faye West



MESSAGE FROM THE PRESIDENT & CEO

We are currently witnessing a new era of global trade, industrialization, and socioeconomic shifts that are profoundly shaping our world. The heightened urbanization of the world population and smart cities, changing environmental trends, increased demand for peer-to-peer consumerism, and the rise of intelligent and autonomous systems are but a few facets of our changing reality.

At the heart of this changing landscape are transformative technologies that are reshaping traditional markets and empowering a new era of global business enablement for industry, and governments alike. It is estimated that by the year 2020 over 50 billion smart devices will be detecting, transmitting, and sharing intelligence on everything from consumer markets and financial services, to health care. Turning this data and algorithms into monetary value is where much of the business thrust will reside in the next number of years.

Last year, Canada's digital economy demonstrated robust growth despite looming interest rate hikes and changing global trade prospects. Canada's digital economy contributed to 4.3% (totalled 74.7 billion) of GDP and employed over 1,450,300 professionals with an impressive job growth that outpacing every other sector of the Canadian economy by 6 to 1.

In 2017-2018, heightening the policy capacity while delivering several innovative talent solutions were the hallmarks of ICTC. Our pledge to address the digital skills gap in a rapidly changing economy led us to the release of the Digital Talent Dividend - Shifting Gears in a Changing Economy in partnership with Microsoft Canada. The report highlighted the shifting nature of our economy and the importance of enabling responsive transitional pathways to reskill workers to high demand opportunities while leveraging the full potential of Canada's diversity. We also released part one of a four part series to define a digital innovation measure for Canada called "Inspiring unfettered imagiNation - Canada's Innovation Climate Index" and published the first of its kind

report in Canada on "Autonomous Vehicles And The Future of Work".

On the talent front, we were also privileged to develop and roll out several pivotal capacity building programs that ranged from building the youth talent supply in Canada, creating pathways to employment for newcomers, to programs that encourage the full participation of women. Among these were: The Student Work Integrated Learning Program; the Digital DASH initiative; the Small Business Digitization Initiative, CareerConnect; IWES, GO Talent, as well as the introduction of CyberTitan for students in affiliation with the U.S Airforce Association's CyberPatriot Program.

The results speak for themselves, in this past year ICTC has had wide ranging successes in speaking and advancing important dialogue on innovation and the digital economy at over 25 key national and international events and had the privilege of having over 80 leading organizations participate in various focus groups and advisory committees.

Finally, my sincere thanks to our partners and stakeholders for their valuable support and trust in our mandate, to the Board of directors for their guidance, and to our very talented staff for their remarkable creativity and determination in advancing the digital agenda in Canada.

Namir Anani ICTC, President & CEO

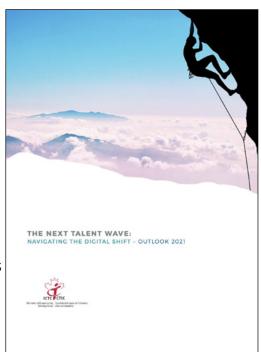


2017/18 ICTC RESEARCH AND POLICY ACTIVITIES

ICTC is Canada's leading centre of expertise for the digital economy. In 2017, ICTC's Research and Policy activities intensified efforts toward delivering best in class Labour Market Intelligence, broadening subject expertise across digital policy subjects, international relationship building, increasing share of voice, and building new advanced analytics capabilities.

Broadening Canada's Digital Policy Discourse

ICTC has broadened its digital policy reach through research and publications on several current-day topics in need of exploration. Key examples include: the first in a four-part series of white papers quantifying domestic innovation through ICTC's Canadian Digital Innovation Measure: the "Innovation Climate Index."; as well as "Presenting Canada to the World", a whitepaper on foreign investment and small business scale-up, written in consultation with Startup Canada. Blogs, Op-Eds, Roundtables, and briefs also covered timely and relevant topics including Canada's De Minimis threshold and its impact on the Canadian ecommerce market, cyber security and digital adoption, and international trade.



Further elaborating the need for discourse on matters relevant to the digital economy, an ICTC Digital Policy Committee was established to fill the current vacuum in Canada for practical, accurate, and timely policy dialogue. Using evidence-based research to inform thoughtful policy recommendations, and through facilitating dialogue on digital policy, ICTC's policy committee can bring Canadian policy matters to the forefront. This cross-sectoral committee, operating at arm's length from the organization, consists of business, government, academia, and relevant subject experts. It facilitates collaboration, information sharing, and consensus-development among varying perspectives. Under the guise of advancing the digital policy agenda in Canada, ICTC also led the creation of the Blockchain Innovation Centre that will work to support, grow, and advance Canada's blockchain ecosystem.

Best in Class Labour Market Intelligence and Economic Research

ICTC continues to deliver forward-looking research on various economic trends, and forecasts future labour and skills needs in Canada's growing digital economy. Notable reports include:

- ICTC's flagship report, "The Next Talent Wave: Navigating the Digital Shift Outlook 2021," a report focusing on the changing nature of technology which is increasingly permeating all sectors of the economy. This report asserts that by 2021, Canada will face a demand of around 216,000 digitally-skilled workers to fill in-demand roles.
- "Digital Economy Talent Supply: Indigenous Peoples of Canada,", a report highlighting Indigenous participation in the Canadian digital economy, equipped with community-driven recommendation for increased engagement of Indigenous peoples with tech.
- "Additive Manufacturing (AM) in Canada: The Impending Talent Paradigm", a report showcasing the labour market impact of AM (3D printing) developments across Canada. "Autonomous Vehicles and the Future of Work in Canada" was published, providing a glimpse into the skill shifts and employment opportunities that the growth of AVs will drive in Canada. Additionally, ICTC held a roundtable discussion with industry, government, and civil society to gain feedback and fuel further dialogue on the relevant issues.
- "The Digital Talent Dividend: Shifting Gears in a Changing Economy", a follow-up to the much-referenced "National Digital Talent Strategy" was published with support from Microsoft Canada. This report highlights topical subjects like the changing nature of work, the demand for talent in digital occupations, and the supply streams available to fill it.



.@ICTC_CTIC estimates that 216K new #tech workers are needed by 2021. Our government is making sure that Canadians are prepared by teaching 1 million kids to code. #CanCode #cdnpoli #jobs



9:52 AM - 31 Jan 2018

ICTC also continues to provide snapshots of the shifts that are being experienced in the labour market through monthly and quarterly reports.



National & International Outreach

ICTC heightened its outreach nationally and internationally in programs and policy advancements. ICTC escalated its outreach of research and policy matters, as well as considerably increased production of opinion editorials, blogs, and commenting in the media. These activities contributed to the dissemination of deliverables and building ICTC's image as the "go to" centre of expertise on the digital economy. ICTC staff spoke at events, participated as panelists, provided keynote speeches, and contributed to discussions throughout the year. Combined, these activities helped to strengthen the organization's role as a key

Jeremy Depow

Soaking it all in at #TechSummit2017 on behalf of @ICTC_CTIC #TradeMissionToIndia



11:51 PM - 14 Nov 2017 from New Delhi, India

ICTC's Research and Policy activities are conducted in a global context, taking into account developments and insights from international stakeholders and governments. ICTC representatives participated in OECD meetings in Mexico, the European Commission's Digital Assembly in Malta, as well as the Federal Government Trade Mission to India with Ministers Champagne, Garneau, and Bains. Other notable activities included meetings with local embassies and policymakers in Luxembourg and Brussels in the interest of strengthening ICTC's and Canada's relationship with the European Union; as well as an ICTC-hosted Belgian-Canadian business luncheon on the digital economy. Our global outreach also includes the dissemination of ICTC research findings, the development of partnerships, and the acquisition of relevant insights from other leading nations in the space.

Advanced Analytics

policy influencer in Canada.

In 2017, ICTC commenced an assessment of how advanced analytics such as natural language processing and machine learning can innovate and strengthen research insights, support digital policy solutions, and others areas relevant to our stakeholders. The resulting decision was to develop and deploy advanced analytics, which is now contributing significantly to our research activities, including the production of up-to-date Labour Market Intelligence. The proprietary methodologies and intellectual property developed has positioned ICTC as the leader in providing timely and granular research results, trends and policy insights in the aim of advancing Canada's digital economy.

CAPACITY BUILDING

NATIONAL LEADERSHIP TASKFORCES

This past year saw two of our national taskforces set a path forward to drive the development of an action plan for Canada leveraging the objectives set out in ICTC's Digital Talent: Road to 2020 And Beyond. Two new resources were developed through the Canadian Leadership Taskforce on Education and Skills – the ICT4ALL toolkit for educators (launched Summer 2017) and a Digital Literacy and Skills Roadmap, launching online in the Fall 2018. In 2018, the Education and Skills Taskforce will continue to promote these resources and build upon its 2017 efforts. The Canadian Leadership Taskforce on Diversity and Inclusion focused this past year on establishing a **3-prong D&I action strategy** that will introduce measures, facilitate connections, and create pathways that promote the importance of diversity and inclusion in the digital economy now and into 2020.

EDUCATION & SKILLS INITIATIVES

CareerConnect

Last year, ICTC's CareerConnect program enabled inexperienced post-secondary graduate Canadians to achieve advanced skills acquisition through subsidized career-related work experiences. The ability of companies to fund the support and development of new young employees significantly increased through the support of this program. ICTC managed to surpass the set objectives by successfully placing 36 young people within 30 different companies. Moreover, 97% of these young professionals secured meaningful employment at the end of the placement with an average salary of \$44,385. Funded by the Government of Canada.

CyberTitan



CyberTitan is a Canadian Cyber Security Education competition for middle and secondary school students. The initiative engages students in critical thinking and problem-solving opportunities to build digital literacy and digital skills. They are given real life security issues to document and solve, including privacy breaches, compromised data systems, and unauthorized access.

Students in grade 7-12 across Canada have been competing



since November among 5000+ teams throughout North America in an online youth cyber defense competition called CyberPatriot. After gruelling rounds of competition that began with 92 CyberTitan teams (500 cyber ninjas) representing Canada, the top 10 CyberTitan teams earned a coveted spot and an all-expenses-paid trip to compete in the first ever CyberTitan National Finals in Fredericton, New Brunswick, on May 16th, 2018. Not only were our CyberTitan teams competing against each other for a spot in the Canadian CyberTitan finals, they were also competing for the CyberPatriot finals. This year's CyberTitan has been possible thanks to the United States Air Force Association's CyberPatriot Program, Sisler High School, Opportunities New Brunswick, CyberNB, NB Department of Education and Early Childhood Development, IBM, ICTC's National Cyber Security Leadership Council on Youth and Education, and with funding in part by the Government of Canda. Special thanks as well to the competition leads: Octopitech, Hacker Highschool and OnionSpace.

CyberEd – National Cyber Security Awareness & Training Initiative

This initiative has been made possible in part by a grant from the Cisco Networking Academy, an advised fund of Silicon Valley Community Foundation. As part of this initiative, 130 educators will have the opportunity to receive training in Cisco's Introduction to Cyber Security and/or Cyber Security Essentials courses at no cost, with resources included to help them integrate cyber security into student learning. Additionally, 8 educators were trained in Cisco Certified Network Associate (CCNA) 1&2



at no cost to be able to offer this to students interested in deepening their information security studies. These professional development opportunities will take place virtually. The courses will be facilitated/led by instructors, while some elements of the course material will also be self-directed.

Digital DASH

ICTC's **Digital Development and Acceleration of Skills Hub Initiative** – or **Digital DASH** - launched in January 2018 as part of the Government of Canada's **CanCode** program. Digital DASH is a 17-month program for grades 6-12 that aims to provide today's youth with learning opportunities to develop digital skills that will open pathways towards digitally-enabled careers to fuel tomorrow's workforce.

The Digital DASH Initiative will partner with educators and industry to identify real-world, in-demand and emerging skills, and map them to existing provincial curricula. By bringing industry and educational stakeholders together and working closely with them to help integrate and accelerate digital skills development inside and outside of the classroom, ICTC hopes to provide a bottom up solution to Canada's skills shortages, while concurrently equipping Canada's youth with the tools to navigate an ever-changing career environment. Some of these new initiatives will be enabled through experiential learning methods, such as business challenges, that will allow students to analyse real world business problems submitted by local industry and to offer solutions. The businesses will then assess the solutions proposed and choose a 'winning' bid that will be implemented by the students themselves. Such real-world scenarios give students a unique opportunity to explore how problems are solved outside the classroom and give them the opportunity to implement their digital skills in actuality.

Digital DASH will be available in all 10 provinces and will fully include programs addressing the needs of Francophone and Indigenous communities across Canada. It also aims to be gender-balanced and address under-represented groups and communities. Many of these new initiatives are umbrellaed under the Digital DASH title and will be hosted on ICTC's new education website which will include a Teacher's Portal and a Digital Skills Passport.

Focus on IT Program

Focus on IT (FIT) is a nationally recognized certificate program designed for Canadian students interested in gaining real-world skills during their secondary school education. It's an innovative program that allows students to gain essential ICT and business skills while completing their high school diploma. Developed alongside top educational and industry professionals, FIT aligns professional skills with provincial curricula and provides



a clear pathway of courses for students to follow. Upon graduation students will have gained relevant knowledge and skills that are demanded by industry and address shortfalls in the current Canadian labour market. Over **600 students were FIT certified in the 2017-2018 year** and since 2008 over 4500 students have been certified.

Under Digital DASH, the FIT program's content will be evergreened and updated.



There are currently 4 streams that schools offer: Interactive Media, Software Design and Development, Business and Information Analysis, Network Systems and Operations. Cyber Security will be a new addition to that list. Moreover, FIT will be rolled out to grades 6-9 under the **Middle Years Focus on IT (MYFIT)** expansion program.

ICT4ALL

ICT4ALL is an online database of tools and resources for educators to help them incorporate ICT and science, technology, engineering and mathematics (or STEM) learning into their classrooms. This one-stop shop saves educators the time and trouble of trawling through numerous individual pages to find what they need. We are encouraging educators and industry who already have set programs to log into ICT4ALL and contribute their learning programs and resources. The site will be available in French this summer.

Small Business Digitization Initiative

The Small Business Digitization Initiative (SBDI) was a 24-week experiential training program that connected youth and small businesses together to solve real employer digital adoption challenges. The initiative provided 55 youth with a platform to learn technical, business, and project management in-class from industry experts. It also provided the opportunity to apply the knowledge and skills in a real business environment, while bestowing 55 businesses with enthusiastic and knowledgeable talent to implement digital adoption solutions to support their growth. The initiative was funded by the Government of Ontario. The businesses (SMEs) that participated gained access not only to digital talent but also to ICT experts (instructors and mentors) who were training and guiding the participants during their work placement, resulting in 100% successful digital adoption across participating companies. The results were life changing for successful youth participants who enhanced their skills, expanded their network, gained work experience, and obtained meaningful employment. For the SMEs, the opportunity to access talent and to jumpstart digitization for business growth and sustainability was highly beneficial.

Work-Integrated Learning Digital (WIL Digital)

WIL Digital is a national initiative to develop talent for the emerging ICT sectors, support businesses, and increase digital adoption in Canada. WIL Digital provides opportunities for students and recent graduates to work, learn on the job, and develop the skills necessary to successfully integrate in the changing labour market of the digital economy. WIL Digital is funded by the Government of Canada. In 2017/18, ICTC worked with employers in fintech, advanced manufacturing, intelligent retail, cyber security, artificial intelligence, and other sectors to build new models for industry and education and to create 190 quality work placements for students and recent graduates. With a strong focus on emerging technologies, and close alignment with the skills required by employers, the program is proud to develop future-ready talent.

As part of WIL Digital, and with the aim of fostering industry-education partnerships, and exploring innovative models of work-integrated learning, ICTC has partnered with academic institutions such as Carleton University and Bow Valley College.

DIVERSITY & INCLUSION INITIATIVES

Advancing Tech Women (ATW)

The ATW initiative aims to increase women's economic prosperity by increasing women's retention and career advancement opportunities in ICT occupations in four major sectors of the economy—natural resources, construction, manufacturing, and trades and to address the systemic barriers facing women in ICT. Through this initiative, ICTC developed the Diversity & Inclusion Readiness Scale to help organizations understand how "ready" they are to become more diverse and inclusive. The Scale identifies stages of readiness and provides resources to help companies move through each stage. This project was funded by Status of Women Canada.

Discover Ability

ICTC is proud to have been a part of the Discover Ability Network to increase employability and awareness among peoples with disabilities funded by the Ontario Chamber of Commerce. ICTC was one of several organizations delivering awareness events, engaging champions, and promoting the Network through various communications channels. Over the course of the contract, over 100 organizations received direct contact and engagement in addition to over 14k impressions on social media outreach.



GO Talent

ICTC is proud to deliver GO Talent – a national pre-arrival initiative for newcomers with experience in the ICT sector. Funded in part by Immigration, Refugees and Citizenship Canada, the initiative is focused on assisting internationally educated professionals maneuver the Canadian ICT labour market. GO Talent supported **565 newcomers** last year, helping new talent navigate the Canadian job market and take advantage of some of the critical skills shortages in the Canadian ICT industry. With more **than 110 companies** from across Canada engaged with the GO Talent initiative and posting **open positions** on the e-Talent job board, or using the platform as an exclusive candidate pool, they have demonstrated that the demand for internationally educated ICT professionals among Canadian companies both big and small continues to grow.

Where we are going: We are continuing to grow our connections with influential employers interested in hiring ICT talent and supporting the job matching process pre-arrival to maximize the opportunities for employers to have access to workers that are available and are coming to Canada. **Now in its 11th year of pre-arrival services**, ICTC is ready to bring added expertise and industry influence to improve the experience for newcomers and employers.

ICTC's Indigenous Initiatives

In 2017, ICTC began placing an increased focus on culturally inclusive and collaborative capacity-building initiatives and policies. By increasing the volume of important and trusted organizational relationships, ICTC began to lay the framework for operational and systemic policy changes, to ensure that we were taking the necessary steps towards industry-based reconciliation. Last year's work towards this goal brought with it a trusted partnership with Canadore College's First Peoples Centre, creating new opportunities for collaborative indigenous-focused training and skills development programs for youth—programs that are developed and managed in a respectful and strategic manner.

ICTC has also laid the foundation for the development of key organizational practices to ensure all outreach, research, and communicative methods are exercised in a culturally mindful manner that respects cultural practices and processes. ICTC's 2017 work led to positive changes and opportunities to develop new and dynamic programming for indigenous youth across Canada, focusing on the development of both foundational as well as higher skilled ICT-based learning for entrepreneurial-minded youth. With the strong importance placed on ICTC's involvement as a trusted partner with Canada's indigenous community, we look to provide high quality programming and research for our partners, fostering Canada's continued digital economic wellbeing.

IWES (Integrated Work Experience Strategy)

Thanks to funding provided by the Government of Ontario, ICTC continued to deliver the IWES program in 2017 – a unique and targeted workforce solution that provides Canadian employers access to newcomer ICT professional talent with the skills needed to drive productivity, innovation, and diversification of their workforce. Through the life of the IWES program, nearly 500 newcomer ICT professionals were provided insights into Canada's technology and business communities, job search services, mentoring, and coaching services in addition to access and connections with employers. The ICT professionals were prepared for commensurate employment opportunities and alternative pathways to employment in Canada's ICT sector. Thus, creating a win-win scenario for employers seeking skilled talent and for the ICT professionals seeking to connect to the labour market and continue their career in Canada.

Unlocking Global Talent Initiative

In 2017, ICTC built, in partnership with Talent Beyond Boundaries, a Washington, D.C.based non-profit, a pilot called the Unlocking Global Talent Initiative. The goal of this initiative was to help fill in-demand roles in the IT sector throughout Canada with skilled refugees who are currently living in Lebanon and Jordon. The experience held by skilled refugees can be a great asset to Canadian companies that are looking for a diverse set of talent who are eligible for private-sector employment.

ONLINE PRODUCTS AND SERVICES

Growing Talent Connections & Insights for The Digital Economy- Check out the expanded Talent and Insights Platform

ETalent Canada is a practical employment tool developed by ICTC to help Canadians navigate career paths in ICT. The online portal offers useful insights for immigrants looking to come to Canada, newcomers, and Canadian citizens who wish to stay informed about national labour market trends. Employers can also post job opportunities and find qualified talent.

Currently available on etalentcanada.ca:

- Labour market information and insights to help better understand where are the ICT jobs located in Canada and what are the salary ranges and perks offered?
- Who is hiring (job postings) and what are the expectations for jobs by province?



Example: A computer network technician relocating to Canada could visit the portal and see that they should ideally be moving to QC or ON, as those locations are where the most jobs are available. To dive deeper, they could compare their combination of education and experience to job requirements.

Coming soon to etalentcanada.ca:

- Post-secondary institutions will better be able to fill available spaces and adapt programs to the needs of the future labour force.
- The WIL DIGITAL program aspect of the portal will be used by thousands of students to find work integrated learning experiences that will kick-start their careers. SMEs have access to a large database of students and active job seekers in Canada and immigrating to Canada

For further updates, stay tuned via Twitter (@ICTC_CTIC) and LinkedIn!

NOTABLES IN A YEAR FULL OF GROWTH

ICTC & Calgary Economic Development Partner on Tech and Digital Skills Gap Survey

The Information and Communications Technology Council (ICTC) is partnering with Calgary Economic Development to undertake a Tech and Digital Skills Gap Survey. Based on the insights from this survey, Calgary Economic Development and stakeholders from education and industry will develop workforce strategies and initiatives that support the growth of tech talent in Calgary.

Policy Forum Event: Belgian-Canadian Bi-lateral Business Luncheon

On March 13th, 2018 ICTC held a bi-lateral luncheon meeting with 13 industry leaders from the Belgian technology sector and 10 North American leaders from companies such as Microsoft and Blackberry. The meeting allowed delegates to discuss the Canada European Union Comprehensive Economic and Trade Agreement (CETA) and the importance of increasing trade between Canada and Europe. View agenda and attendees

ICTC partners with Opportunities NB (CyberNB Team) (ONB), and Education and Early Childhood Development New Brunswick (EECD)

Goal of the partnership is to collaborate on motivating students towards STEM and cyber education. It will also help them prepare for working in the global economy,

including working together to establish pathways for students interested in pursuing cyber security or ICT /STEM in their post-secondary education and careers.

ICTC and Partners Launch Canadian Blockchain Ecosystem

In collaboration with ColliderX, the Blockchain Association of Canada, the Blockchain Research Institute, and Blockchain Canada, ICTC is pleased to announce plans to strengthen Canada's digital advantage by further developing a nationwide blockchain ecosystem.

Minister Patty Hajdu kicks off a unique nation wide student work-integrated learning programs for the Digital Economy

WIL Digital was officially launched at SAP Labs Vancouver – BC by the Honourable Patty Hajdu, Minister of Employment, Workforce Development and Labour and ICTC President & CEO, Namir Anani.

Heightening the Digital Policy Agenda for Canada

ICTC and Canada's Digital Policy Forum (CDPF) amalgamated in order to advance primary research, analysis, and public policy recommendations in support of Canadian competitiveness in the global digital economy.

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