



Upping Our Game

advancing the digital economy in Canada

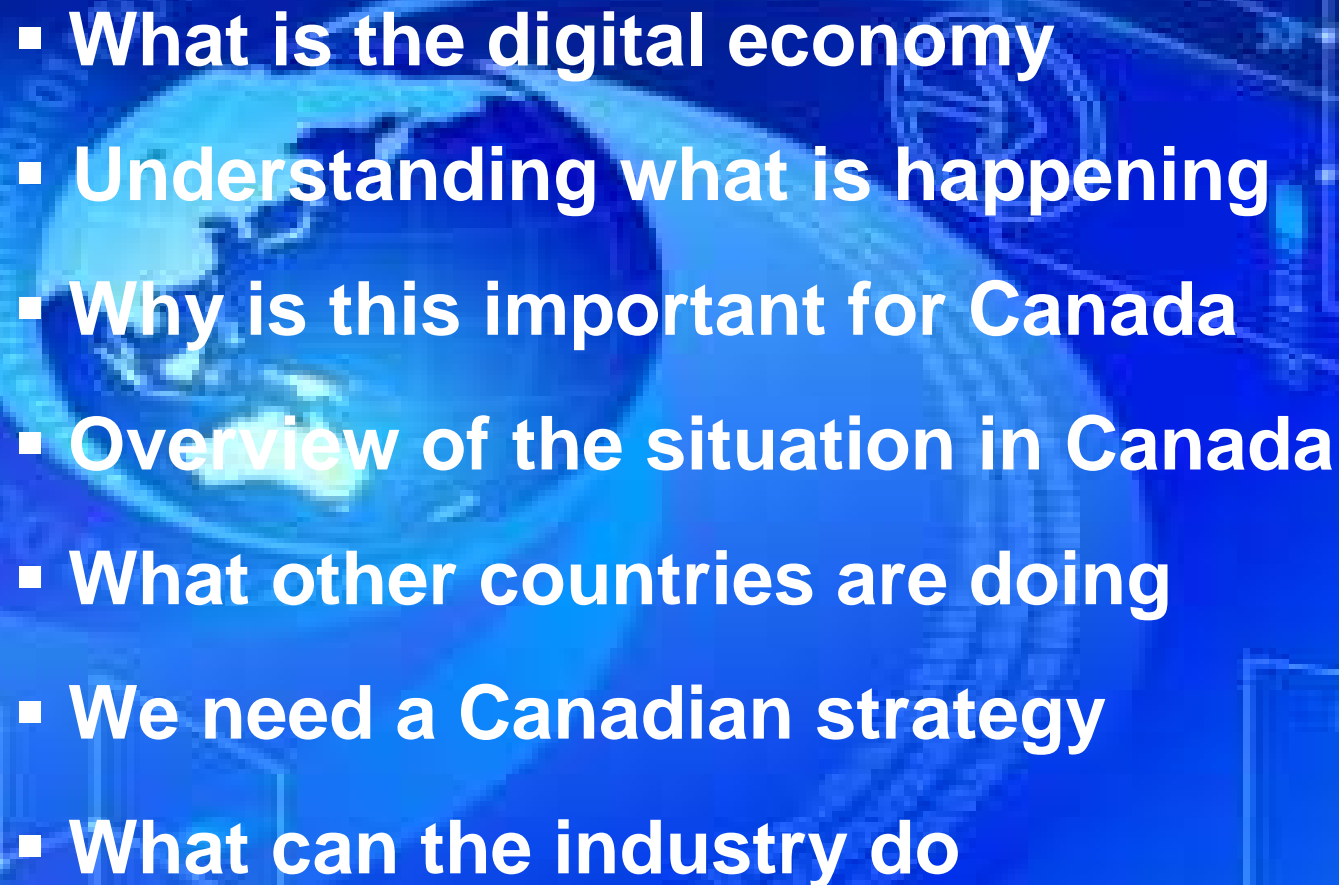
Tom Turchet

Chair, Information Technology Association of Canada

February 11, 2010

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Agenda

- 
- What is the digital economy
 - Understanding what is happening
 - Why is this important for Canada
 - Overview of the situation in Canada
 - What other countries are doing
 - We need a Canadian strategy
 - What can the industry do



What is the Digital Economy

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Digital Economy

Dig.i.tal e.con.o.my

noun

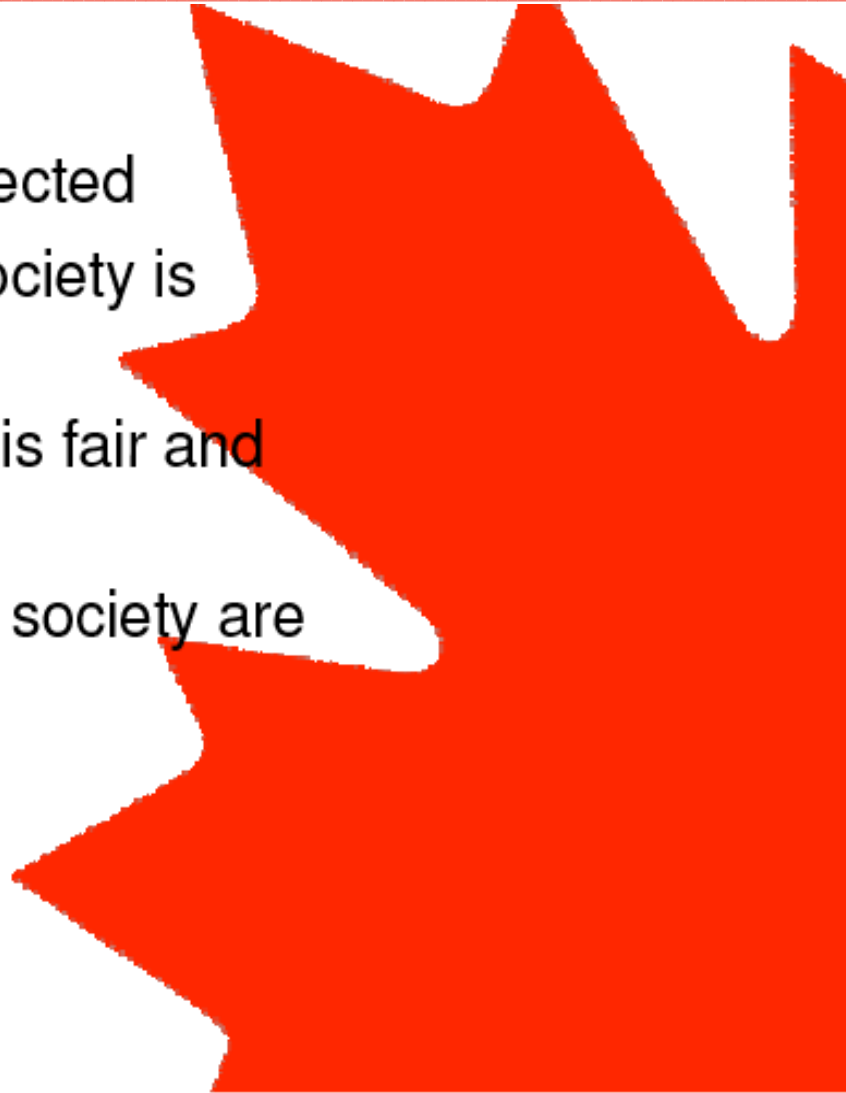
Definition:

business transactions on the Internet: the marketplace that exists on the Internet



Digital Economy for a Nation

- Every citizen is connected
- All content used in society is available
- An ownership model is fair and transparent
- Common activities in society are just as easy in digital



Understanding what is happening



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Understanding what is happening

Moving Away From Keyboard Entry

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...and away from our desks

digital media

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Understanding what is happening

To Mobile Access

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digital media

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Understanding what is happening

Digital Content will be in everything

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Digital media are just intersecting databases of bits residing and delivered through various application technologies.



digital media

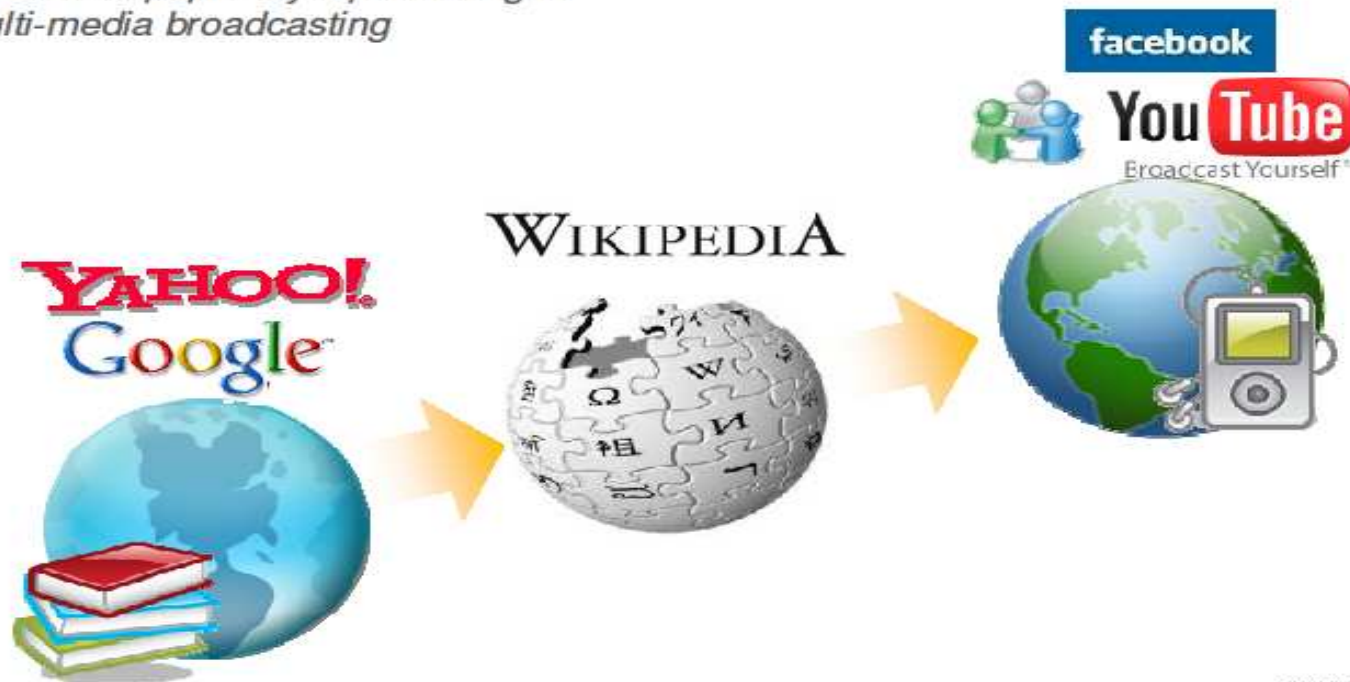
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Understanding what is happening

The Web is Evolving beyond Broadcast

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*From newspaper style publishing to
multi-media broadcasting*



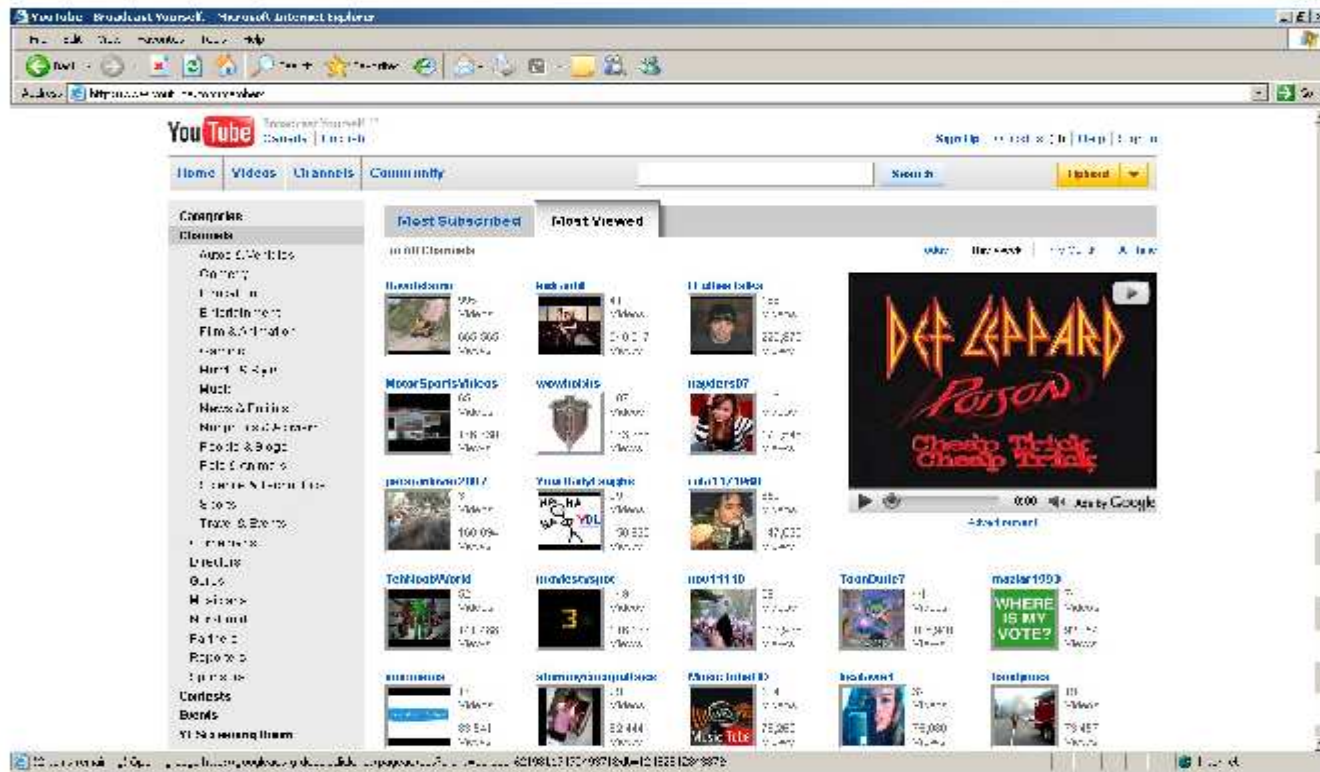
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Understanding what is happening

YouTube – The Global Broadcaster For Under 25

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Understanding what is happening

BBC's – iPlayer – A Global Audience

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The screenshot displays the BBC iPlayer interface. At the top, there's a navigation bar with the BBC logo and various menu options like 'Home Asset', 'View Asset', 'Asset Info', 'Find Party', 'Actions', 'System Admin', and 'Notifications'. Below this, a search bar shows 'Find Asset : Top Gear'. The main content area is divided into two sections: a grid of video thumbnails on the left and a media player on the right. The thumbnails show various scenes from the Top Gear show, including cars and hosts. The media player shows a video of a host standing next to a silver sports car. Below the media player, there's a table with columns 'In', 'Out', and 'Description'.

In	Out	Description
00:00:00	00:00:00	
00:00:00	00:00:00	
00:00:00	00:00:00	

Below the table, there's another section with a similar table structure, but the content is partially obscured by a blue box.

Deliver to an audience of
3 billion cell phone users

digital media

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Understanding what is happening

Canadian Scope of Digital Content

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Initial estimate of Canadian material

- Books = 2 million
- Newspapers = 380,000 reels (380 million pages)
- Serials = 87,000 titles
- Theses = 290,000
- Songs = 1.3 million
- Film/broadcast = 230,000 hours
- Maps = 2.5 million
- Images = 25 million

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Why is this important to Canada



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Why is this important to Canada

- Sustainable growth is dependent on technology
- Enhances a society's ability to innovate and remain competitive
- Drives high-value job creation
- Fuels creativity and leadership
- Lower investment in ICT is the primary reason Canada is falling behind productivity of other nations
- We will soon reach a point where we can no longer catch up



Overview of the situation in Canada



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Overview of the situation in Canada

OUR INDUSTRY IS HEALTHY!!!!



- Largest Employer in country (575,000 jobs)
- \$6.22 billion in R&D investments (38% of all private sector R&D)
- Most educated workforce – 42% have degrees vs. 24% ave.
- Compensated 47% higher than the national average
- Rate of growth highest in country

However, our country is falling behind

Let's look at some facts.....

The Economist Intelligence Unit

The logo for The Economist, featuring the words "The Economist" in white serif font on a red rectangular background.

E-Readiness ranking, which measures the extent to which market is conducive to internet-based opportunities, shows Canada slipped from 4th in 2001 to 13th in 2006.

World Economic Forum



Networked readiness index, which measures the degree of preparation to participate in and benefit from ICT developments, shows Canada slipped from 6th in 2005 to 11th in 2006.

However, our country is falling behind

OECD – Global Competitiveness Index rankings

1. Switzerland
2. United States
3. Singapore
4. Sweden
5. Denmark
6. Finland
7. Germany
8. Japan
9. **Canada**
10. Netherlands

12 Pillars of Competitiveness

Institutions

Infrastructure

Macroeconomic Stability

Health and Education

Higher Education and Training

Goods Market Efficiency

Labour Market Efficiency

Financial Market Sophistication

Technology Readiness

Market Size

Business Sophistication

Innovation

However, our country is falling behind

How does Canada compare (OECD)

Availability in Latest technology

1. Iceland
2. Sweden
3. Finland
4. Norway
5. United States
6. Switzerland
7. Denmark
8. UAE
9. **Canada**

Firm Level Technology Absorption

1. Iceland
2. Japan
3. Switzerland
4. UAE
5. United States
6. Sweden
7. Denmark
8. Norway
9. Finland

21. Canada

Atlantic Canada

'Tech gap a drag on region, APEC says'

The
ChronicleHerald.ca
Jan 20, 2010

- ICT sector increased its share of GAP from 2.5% in 1997 to 3.7% in 2008
- ICT contributed 2.65B to economy
- Employs 32,000 people
- Sector grew twice as fast as overall economy

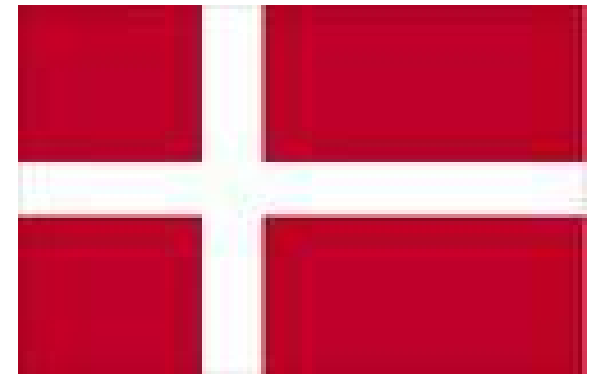
BUT

- ICT spent per worker is 80% of national average
- Improvement of 10% from 2000

Competition is fierce



What are other countries doing?



Why is this important to Canada

Other Countries are serious



BRITAIN: 'Digital economy to reboot Britain' Financial Times

INDIA: 'India's Digital economy set to surge' Information Week



DENMARK: 'Denmark is the clear leader in the Information Society'
The Economist



SINGAPORE: 'Creating the Digital Economy – Strategies from Singapore'

International Journal of Electronic Commerce



FINLAND: 'An ICT-driven knowledge economy' e.Finland



Why is this important to Canada

.....and the United States (Jan 15, 2010)

‘Visting CEO’s told that Government remains hampered by old tools’ CBS News

In conjunction with the opening of a summit meeting between **President Obama and business CEOs**, Orszag complained that federal workers own better computers for their personal use than the ones the government equips them with during their work days.

More than fifty CEOs assembled at the White House to attend the “**Forum on Modernizing Government**” where, among other things, they offered suggestions on how to update the executive branch’s IT systems. In his welcome, the president joked that Washington was “the city where I had to fight tooth and nail just

We Need a Strategy



Upping our Game

A National ICT Strategy for Canada

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We Need a Strategy

The call for a National strategy....

Upping our Game:

- Canada's got talent, just not enough
- Building 21st century infrastructure
- Adoption of technology
 - Gov't as lead users
- Canada needs a more competitive tax regime
- Opening up access to capital
- Need for a smarter legal and regulatory regime

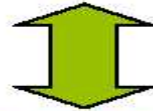
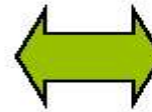
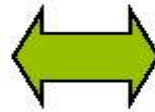


We Need a Strategy

The call for a National strategy....

Collaboration is key

Collaborate in Canada



digital media

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We Need a Strategy

Several Key events are positive

- June 2009, ITAC publishes “Upping our Game”
- June 22, 2009, Ottawa’s Government Conference Centre
Ministry of Industry, Tony Clement
- June 8-9, 2009, Canada 30 Forum, Stratford, Ontario
- Ongoing, Canada Prospect
Digitize all Canadian content and make it available to Canadians
- Feb, 2010, Minister Diane Finlay Dinner with ITAC
- Feb, 2010, Minister Tony Clement at ITAC Dinner



What can the Industry do



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What can the Industry do

- Although we are not uniform in our composition, our industry needs a strong voice. ITANS is a key part of the strong voice.
- Strong voice is a coherent message between industry, government, education. The strategy has multiple dimensions and needs multiple engagements
- Get loud and stay on message

Conclusion

What does this mean for Canada

- Our Competitiveness as a country and as a society will depend on our ability to use technology wisely as an investment
- To remain competitive we must do this better than rival countries and societies
- We only represent 2.5% of the world wide web
- Let's punch above our weight!



*Thank
You*

